Board of Directors Quarterly Meeting

University of California College of the Law, San Francisco
333 Golden Gate Ave, Room LL03, San Francisco, CA 94102
2025-09-12 09:00 - 13:00 PDT

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9.4. Report Item: Introduce Executive Director of Human Resources Lesley Bello

10. Director Comments and Board Announcements

11. Call to Order

12. Approval of Prior Meeting Minutes

13. Ratification of Executive Committee Approval of New MOU with UC-AFT

14. Approval of Scholarships

14.1. Webb Scholarship

14.2. Dreyer Fund

15. Legal Updates

15.1. Federal Matters

15.2. AFSCME

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15.4. Sidewalks Litigation

15.5. Name Change Litigation

16. Cyber Audit Update

17. Personnel Matters: Chancellor and Dean Search

18. Adjournment

Board of Directors Quarterly Meeting Minutes

University of California College of the Law, San Francisco
June 12, 2025

333 Golden Gate Ave., San Francisco, CA 94102, Room 203. Participants and members of the public were also able join the open session via the web link or dial-in numbers listed in the public notice of this meeting linked here: *https://www.uclawsf.edu/our-story/board-of-directors/board-meeting-notices-agendas-and-materials/*.

1. Roll Call

The Chair called the meeting to order at 9:00 a.m. and the Secretary called the roll.

Directors Present
Director Albert Zecher, Chair
Director Courtney Greene Power, Vice Chair
Director Simona Agnolucci
Director C. Donald Clay
Director Andrew Giacomini
Director Andrew Houston
Director Claes Lewenhaupt
Director Joshua Perttula

Directors Absent
Director Shashi Deb
Director Chip Robertson

Staff Participating
Chancellor & Dean David Faigman
Chief Operating Officer Rhiannon Bailard
General Counsel & Secretary John DiPaolo
Chief Advancement Officer Julia Jordan
Chief Communications Officer John Kepley
Assistant Dean for the Career Development Office Amy Kimmel
Assistant Chancellor & Dean/Chief of Staff to the Chancellor & Dean Jenny Kwon
Deputy Chief Financial Officer & Controller Sandra Plenski
Provost & Academic Dean Morris Ratner
Faculty Executive Committee Member Prof. Reuel Schiller
Chief Financial Officer David Seward

Others Participating
Michael Alloggiamento, UCLAS President

2. Public Comment Period

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

3. Approval of Prior Minutes

Motion:
The Chair invited a motion to approve the March 13, 2025 open session meeting minutes.
Motion made and seconded. Motion carried.

4. Report of the UCLAS President

Mr. Alloggiamento introduced himself as the student body president for the 2025-26 academic year. He thanked the Board for the opportunity to speak and emphasized that timely communication of student concerns is essential. He reported that the student union bargaining process is ongoing and that he strongly supports their bargaining team. He described recent difficulties students have experienced with the healthcare provider Carbon Health, including delays and coverage gaps that have caused stress despite recent resolutions. He mentioned the creation of a student seat on the Executive Oversight Board of UC SHIP and the revival of the Student Health Advisory Committee to improve future contract negotiations. He also expressed appreciation for resources posted by Dean Zavala for international and undocumented students and urged use of the legal referral panel led by Professor Richard Boswell. Finally, he reaffirmed his commitment to fostering both academic and emotional growth for the entire campus community.

5. Report of Secretary

5.1. Confirmation of New Board Members

Mr. DiPaolo requested the Board confirm the Governor's nomination of two new directors, C. Donald Clay and Joshua Perttula, and suggested that they be voted in together.
Motion:
The Secretary called for a motion for the floor to vote and approve the nomination.
Motion made and seconded. Motion carried.

5.2. Election of Chair and Vice Chair 2025-2026

Mr. DiPaolo introduced the election of the chair and vice chair for the coming year. He began by thanking the current chair, Director Albert Zecher, for his dedicated service over the past year, acknowledging the significant effort involved. Mr. DiPaolo then opened the floor for nominations for chair. Director Agnolucci nominated Director Power as chair, describing her as a long-time comrade and partner on the board and praising her as an incredibly engaged member. She expressed confidence that the Board and the institution

would thrive under Director Power's leadership and said she would be very excited to see her serve as chair.
Mr. DiPaolo asked Director Power if she accepted the nomination, and she agreed, thanking Director Agnolucci for her kind words. No other nominations were made.
Vote:
The Secretary called for a vote to approve Director Power to serve as Chair in the coming year.
She was unanimously elected.
Mr. DiPaolo then called for nominations for Vice Chair.
Chair Power nominated Director Zecher as vice chair. She noted the tradition of swapping roles, which provides helpful continuity, and expressed how much she had enjoyed working with Director Zecher over the past year, learning about the ins and outs of San Francisco from him. She welcomed the opportunity to continue collaborating with him as the board navigates its challenges and opportunities, formally nominating him to serve as vice chair.
Mr. DiPaolo asked Director Zecher if he accepted the nomination, and he agreed. No other nominations were made.
Vote:
The Secretary called for a vote to approve Director Zecher to serve as Vice Chair in the coming year.
He was unanimously elected.

6. Report of the Board Chair:

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

6.1.1. Report of the Chief Communications Officer

Mr. Kepley noted that the submitted materials highlighted much of the work planned around Spring Week and the student series, which featured students discussing the differences and benefits of a UC Law San Francisco education and sharing their perspectives. He explained that these stories would have a broad impact, as they had already run on social media, message boards in the lobbies, and the website during admissions and retention season. Additionally, the series would support upcoming initiatives with the Advancement team.

6.1.2. Report of the Chief Advancement Officer

Ms. Jordan rested on her written report.

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

6.2.1. Reporting Items

Dean Ratner welcomed the newly appointed directors and introduced Prof. Reuel Schiller, who serves on the Faculty Executive Committee. He noted that Dean Tiffany Gabrielson will present a detailed report on student health services at a a future meeting to address the concerns raised by Mr. Alloggiamento. Dean Ratner acknowledged that while some students face challenges with health services, the system generally works as intended, and the administration remains committed to resolving issues at the margins. He also affirmed that the school shares student concerns regarding immigration and is thus providing support services and ensuring students are informed about available resources.

6.2.1.1. Strategic Plan Implementation

Dean Ratner gave a brief overview of agenda items, noting that each year the board receives reports on the implementation of the strategic plan adopted in 2020, which included several overarching goals. While not all goals are fully achieved, most initiatives have been successfully completed, advancing objectives in student success, scholarly impact, fiscal health, development of the academic community, and community cohesion. He highlighted historically high bar passage rates for July 2024 and February 2025 exams, strong employment outcomes for the Class of 2024, and the timely implementation of academic policies. He also noted ongoing challenges, including the upcoming new bar exam for Fall 2025 students and fluctuations in the employment market.

6.2.1.2. Student Success Initiatives - Academic Policy Changes

Dean Ratner rested on the written report.

6.2.1.3. Student Outcomes - Bar and Employment

Dean Ratner rested on the written report.

6.2.1.4. Faculty Scholarship Report

Dean Ratner rested on the written report.

6.2.1.5. Interim Policy on Free Speech

Dean Ratner rested on the written report.

6.2.2. Voting Item - Interim Academic Freedom Grievance Policy

Dean Ratner explained that the interim academic freedom grievance policy applies primarily to faculty and staff engaged in scholarly work, whereas the free speech- policy protects all community members, including students. Both policies are required by the ABA. He explained

that academic freedom allows faculty and research staff to conduct and disseminate scholarship without fear of penalty, and that the grievance policy provides a process to adjudicate claims of violations. He described the grievance process flow: staff complaints route through the Provost and Academic Dean to the Chancellor; faculty complaints are first reviewed by the Faculty Executive Committee and may be appealed to a three member panel (two board members and one faculty member) established- for each case.

Chair Power asked for clarification that the free speech policy applies to all community members, including students, and Dean Ratner confirmed that. She then asked whether the grievance policy, which governs the adjudication of complaints, also covers students or only faculty and staff, specifically questioning where a student's claim of a free speech violation would be addressed. Dean Ratner explained that there are two separate policies: one protects free speech for all community members, faculty, staff, and students, with its own claims process, while the academic freedom policy, closely related to free speech, primarily applies to faculty and staff engaged in scholarship. Chair Power confirmed that she understood that students are not covered by the new academic freedom grievance policy being voted on that day.

Director Clay asked what was meant by academic freedom. Dean Ratner described it as a set of principles that ensure that scholars at universities are free to engage in research and develop ideas without fear of reprisal for the subjects they study or the conclusions they reach.

Motion:
The Chair called for a motion to accept the recommendation of the Academic Standards Committee and approve the academic freedom grievance policy.
Motion made and seconded. Motion carried.

Vice Chair Zecher thanked Dean Ratner and faculty for their work on the formative assessment initiative and changes to the grading system. He noted that these efforts will go a long way in supporting student success and asked that appreciation be extended to the faculty for their collaboration.

7. Action Item: Finance Committee Consent Calendar

Mr. Seward presented the consent calendar, which aggregates all items previously approved by the Finance Committee.
Motion:

The Chair called for a motion to approve the Finance Committee consent calendar. Motion made and seconded. Motion carried.

7.1. Action Item: Report of the Subcommittee on Audit

7.1.1. Action Item: Approval of the 2025 Audit Plan

7.1.2. Action Item: Selection of Audit RFP Steering Committee

7.2. Action Item: Budget Preauthorization for 2025-26 – Compliance Upgrades – Food Service

7.3. Action Item: Auxiliary Enterprises – Proposed Budget 2025-26

7.4. Action Item: Housing Authority Proposed Budget 2025-26

7.5. Action Item: State Contracts and Grants in Excess of $100,000

7.5.1. UCSF – Security Services

7.5.2. Allied Universal – Security Services

7.5.3. Urban Alchemy – Safety & Sidewalk Services

7.5.4. Academic Village – UC Davis MSBA Program Management Space

7.5.5. Academic Village – UC Davis MSBA Instructional Space

7.5.6. Security Technology Maintenance – Commercial Controls

7.5.7. Enrollment Management – MSL Digital Marketing

7.5.8. Information Technology – Salesforce Inc., MuleSoft Software Integration

7.5.9. Human Resources and Payroll – Independent Contractor Andrew Scott

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

7.6.1. Academe at 198 – Wi-Fi Stabilization

7.7. Action Item: Miscellaneous Fees & UCSHIP Student Health Insurance Premiums for 2025-26

7.8. Action Item: UC Law Foundation – Approval of Updates to the Operating Agreement

7.9. Action Item: Compensation Range Adjustment – Adjunct Scales

8. Report of the Chief Financial Officer

Mr. Seward explained that the next items had not been included in the Finance Committee package due to timing considerations.

8.1. Action Item: State Contracts and Grants in Excess of $100,000

Mr. Seward noted that while the budget had already been approved by the Finance Committee, this step sought contract approval for the Build Group to

carry out compliance upgrades in the Law Café. He emphasized that these were not cosmetic improvements, but essential health and safety upgrades required to meet San Francisco health inspection standards.

Motion:

The Chair called for a motion to approve item 8.1.
Motion made and seconded. Motion carried.

8.2. Action Item: Round Valley Unified School District – Educational Opportunity Fund

Mr. Seward introduced Item 8.2 as a ratification of an action taken by the Executive Committee in April, the approval of a memorandum of understanding with the Round Valley Unified School District. He explained that since 2017 the institution had been engaged with the Round Valley Tribal Council and community members as part of its restorative justice efforts. As part of those ongoing efforts, the institution negotiated an MOU to create scholarship opportunities for graduates of the Round Valley Unified School District. A delegation was scheduled to travel the following week to formally sign the document. Mr. Seward noted that the agreement had been very well received, fostering better relationships between the Tribal Council and the school district, which historically had not always been the case. He requested final approval so the institution could execute the agreement.

Chair Power said that the agreement was a partial solution, to some of the challenges faced in moving forward with the restorative justice effort. She congratulated Mr. Seward, Dean Faigman, and everyone involved, noting that it felt good to take this step forward.

Mr. Seward added that the agreement would support students whether they chose to pursue welding school, community college, or any accredited institution. He explained that the funds would remain within the institution's financial system, with only payout amounts from the designated $250,000 being disbursed, ensuring that the arrangement still nested within UC Law's financial statements. He also praised the strong dialogue with the school district and acknowledged the contributions of UC Law students and Professor Jo Carrillo, noting that the effort grew out of engagement between the Indigenous Law Students Association and the Round Valley tribal community.

Motion:

The Chair called for a motion to ratify the MOU.
Motion made and seconded. Motion carried.

8.3. Strategic Investments - UC Law SF

Mr. Seward stated that he and Dean Ratner worked on compiling a more detailed list of elements that would be worthy investments of the school's limited resources. He noted that Chancellor & Dean Faigman incorporated these needs into his budget presentation. Dean Faigman added that much of this will be covered in his closed session presentation, so it would be best to wait.

9. Report Items: Finance Committee Reports:

9.1. Investment Report as of April 30, 2025

Mr. Seward rested on the written report.

9.2. State Budget Report for 2024-25 as of March 31, 2025

Mr. Seward rested on the written report.

9.3. Auxiliary Enterprises Budget Report as of March 31, 2025

Mr. Seward rested on the written report.

9.4. The Academe at 198 & AVFA – Budget Report as of March 31, 2025

Mr. Seward rested on the written report.

9.5. Academe at 198 – Leasing & Marketing Update

Ms. Bailard reported that a new chart shows building occupancy at 76 percent (251 of 267 units) for 2025-26—essentially unchanged from the previous year because 22 office units remain occupied by UC Law staff. UCSF has requested additional units for its students and faculty.

Mr. Seward explained that the budget assumes 95 percent occupancy to meet debt service requirements (DSCR 1.2). With seven weeks left in the lease up cycle, final adjustments are expected in the fall.

Vice Chair Zecher asked whether the remaining weeks could raise occupancy to 90 percent. Ms. Bailard said early leasing in April was strong, but May/June activity is slower than hoped, especially after moving first year students earlier; she remains cautiously optimistic about reaching the 95 percent goal.
Mr. Seward noted that last year a post July 4 surge boosted leases, but the improved admissions process this year makes the pattern uncertain.
Dean Faigman added that many admitted students place deposits while staying on waitlists elsewhere, prompting a rush for housing after July 4.
Regarding 100 McAllister, Mr. Seward explained a partnership with the community college system; once City College fills, the tower will provide housing for several BayArea community colleges. The building will feature tiered pricing: economy units on the lower floors of the Tower, midrange units at 198, and premium units on the upper floors of the Tower.

9.6. State Budget Update for 2025-26

Mr. Seward reported that the Governor's January budget provided a $2.4 million (3 percent) increase to the institution's workload budget and authorized phased funding for the McAllister Tower project. Rather than a $154 million cash grant, the state approved $10.07 million per year for 30 years to support debt service, supplementing historic tax credit financing. Following revisions, the projected cut to the Governor's budget fell from 7.95 percent to 3 percent, yielding a net gain for the College of $1.2 million compared with the prior year.

Vice Chair Zecher asked about funding for the next year, asking whether any restructuring would be necessary or if there would be a deficit. Mr. Seward responded that there is still a deficit, though smaller than before. The deficit may increase depending on the outcome of labor negotiations. He explained that with the favorable state funding outcome and factoring in restructuring in 2025–26, including layoffs of non-represented employees, the deficit for 2025–26 is expected to shrink to $1 million. This calculation includes the rescission of represented employee reductions, additional financial aid costs, $800,000 in one-time food service costs, , as well as revenue from the 7.5 percent board-approved fee increase. Looking ahead to 2026–27, the deficit will largely depend on fee levels and funding outcomes for that fiscal year. Mr. Seward clarified that these numbers account only for the first phase of the adjunct pay-scale adjustment, with no other strategic investments included.

Chair Power asked, as a process matter for the budget, when it would be finalized. Mr. Seward explained that by law, the budget must clear the legislature by June 15 and go to the Governor by July 1. However, he noted that a second budget process occurs in October once federal outcomes are known, particularly regarding Medi-Cal and Medicare payments. He mentioned that FEMA issues have not yet been fully resolved with the federal government, but he did not anticipate higher education being significantly affected in the October process. Mr. Seward added that the legislature has historically prioritized higher education, and it would take a catastrophic set of circumstances to change that for 2025–26, though he expressed uncertainty about 2026–27.

Chair Power noted that, based on public reporting, there could be a catastrophic impact on the general fund from the potential withdrawal of federal funding, emphasizing that California's budgetary cycle is already uncertain. Mr. Seward responded that an imminent announcement regarding

federal actions affecting California's budget, including contracts and grants for CSU and UC, is expected and could be quite draconian. He explained that secondary impacts on the university, such as UC Davis's masters degree in data analytics program, which hosts about 110 UC Davis students, largely international, are uncertain. While contractual obligations with UCSF are likely secure, UCSF itself will face significant challenges due to its reliance on research programs, which could indirectly affect UC Law's revenue and cost structure, including services like contracted UCSF police. Mr. Seward emphasized that these effects are difficult to predict with any certainty.

9.7. Tenderloin Investment Partnership

Mr. Seward rested on the written report.

9.8. Academic Village – Tower Project – Status Update and Phase 2 Financing

Mr. Seward rested on the written report.

9.9. Financial Planning – Capital, IT Infrastructure, and Other Improvements

Mr. Seward rested on the written report.

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

Mr. Seward rested on the written report.

10. Report of the Chancellor and Dean

Dean Faigman reported that admissions remain robust, with an anticipated entering class of approximately 400 students. The median LSAT score rose from 160 to 161, the median GPA increased to 3.72, and applications grew 28 percent, surpassing the national average increase of 22 percent. He highlighted the school's strong position in the bar exam pass rate rankings and noted that the upcoming July exam will revert to in person administration, alleviating prior logistical concerns.
He discussed housing occupancy, targeting 95 percent (approximately 251 units for UC Law) and noting that current occupancy stands at 76 percent. He expressed optimism that the remaining lease up weeks will bring occupancy closer to target. Dean Faigman also addressed the importance of maintaining competitiveness amid fluctuations in international student enrollment and emphasized continued investment in first-year student experience, career development support, and strategic legal and political advice regarding developments in Washington, D.C. He warned of potential fiscal pressures from the federal budget reconciliation bill and federal budget uncertainties but affirmed confidence in the institution's strategic planning capacity.

Dean Faigman noted that the California Supreme Court remained deeply engaged in overseeing the State Bar and was committed to ensuring a fair and effective licensure system.

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

10.2. Report Item: Monitoring of implications of federal policies and executive orders

11. Director Comments and Board Announcements

No comments.

The Board entered closed session at 10 a.m. pursuant to Education Code Section 92032(b)(3),(5),(6)&(7) and Cal. Gov't Code §11126.

The Board reconvened the open session at 11 a.m.

Mr. DiPaolo reported that during the closed session, the Board approved the minutes from the last closed session meeting, approved new Distinguished Faculty (Jodi Short, Reuel Schiller, and Dave Owen), approved use of contractual sabbatical credit by Ming Chen in FA25, ratified the Khaleed Rasheed Scholarship, approved the Field Scholarship, and approved of Wingate Scholarship.

12. Adjournment

The Chair adjourned the open session at 11:10 a.m.

Respectfully submitted,

_____

John K. DiPaolo, Secretary

John Kepley

Chief Communications Officer

Aug. 21, 2025

UC Law SAN FRANCISCO

Recent Work Includes

- ‘Leader in Technology, Innovation, and AI Law’ page | here
- ‘Giving’ page to support Advancement efforts | here
- ‘Connect with Us’ page to support Advancement | here
- Story content that advances strategic goals:
  - Strong ties to Japan prepare alumni to lead on global stage | here
  - Faigman research spurs bar changes in NV and beyond | here
  - Top Silicon Valley professionals training next generation of lawyers | here
  - Faculty Who Lead briefs on Price, Short

Agenda of featured content

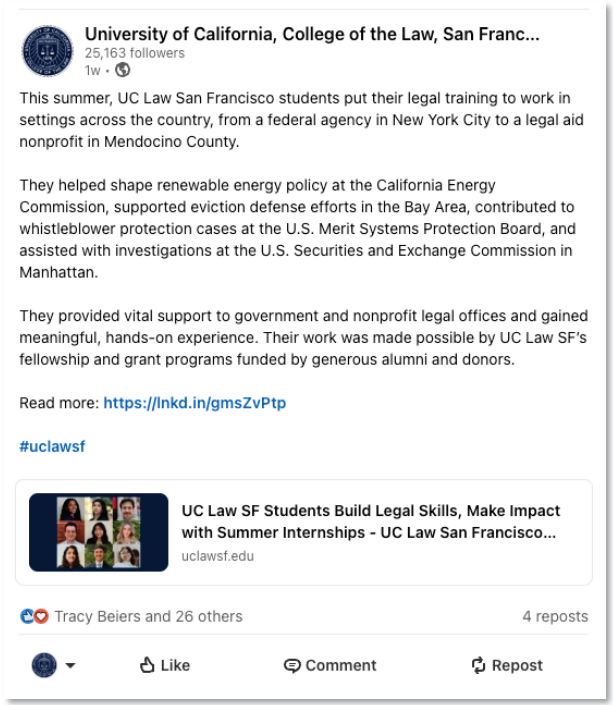
- Summer content series
- Leader in Technology, Innovation, and AI Law page
- Academic Village Showcase page

Summer content series

Goals:

- Promote the UC Law SF educational experience to key audiences
- Tap into “back to school” cultural moment
- Build on lessons from “Evidence of Success” series
- Cover broader array of summer experiences than traditional story approach
- Reinforce students’ decisions to enroll at UC Law SF & build pride from Day 1

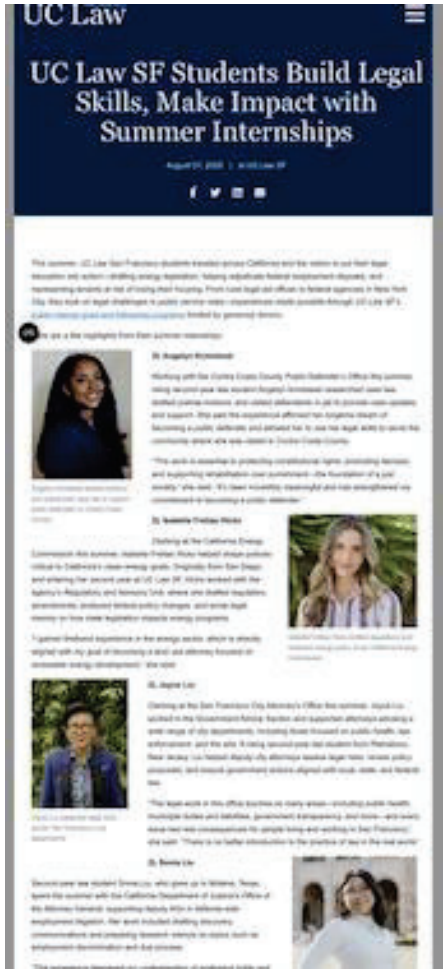
Spring content series



August 1

LinkedIn post

Story posts on website

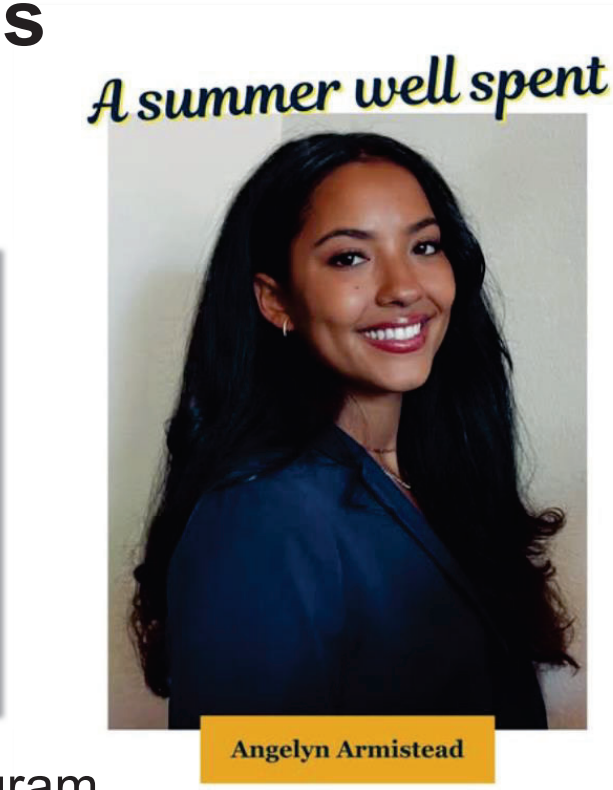


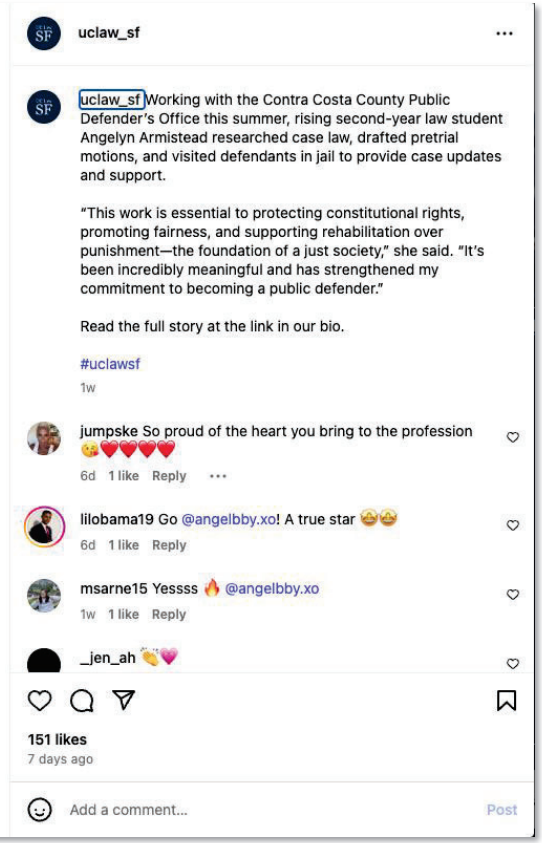
Spring content series

August 4



Digital billboard



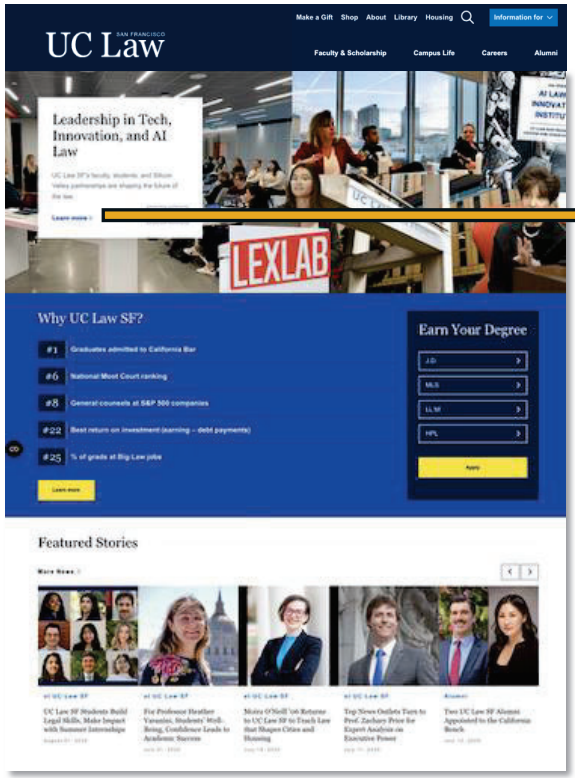


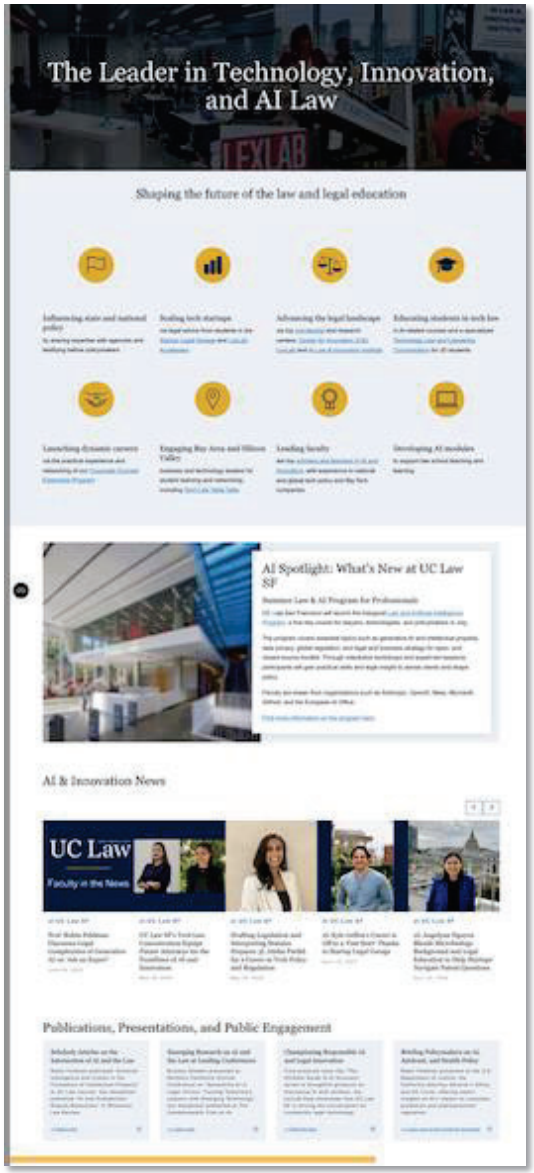
Instagram

Promoting AI, Tech Excellence

Goals:

- Elevate a key content area.
- Inform stakeholders of a UC Law SF strength.
- Leverage in reputation, advancement efforts.



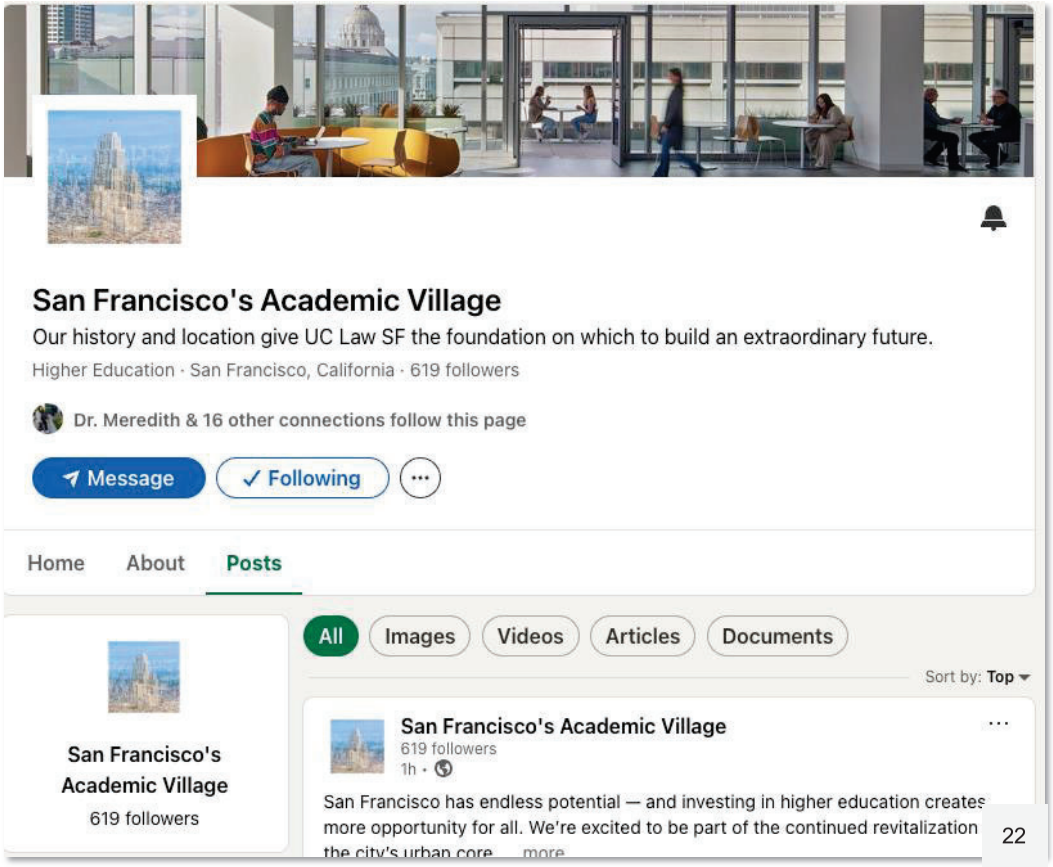


Sections highlighting AI Law & Innovation Institute, LexLab, donor link, faculty, proximity map, UC Law SF Science and Technology Journal

Academic Village Showcase Page

Goals:

- Advance a strategic priority
- Engage key stakeholders
- Build third-party support for AV



Academic Village Showcase Page

San Francisco's Academic V...
Thu 7/17/2025 12:27 pm PDT

UC Law San Francisco has deep roots in the Tenderloin, one of San Francisco's most resilient neighborhoods. Our Academic...

Tenderloin Investment Partnership

Engagement Rate (per Impression)	**43.5%**
Impressions	**941**
Engagements	**409**

Community partner

San Francisco's Academic V...
Thu 6/12/2025 11:11 am PDT

Months of planning have led up to this important step in the seismic retrofit of the historic 100 McAllister tower. Watch to see how collaboration made it possible.

Engagement Rate (per Impression)	**13.3%**
Impressions	**354**
Engagements	**47**

Partner content

San Francisco's Academic V...
Tue 7/8/2025 3:22 pm PDT

At UC Law SF, education is more than a mission—it's a commitment lived every day in the heart of the Tenderloin. San...

Engagement Rate (per Impression)	**12.7%**
Impressions	**687**
Engagements	**87**

Partner content

San Francisco's Academic V...
Thu 8/7/2025 3:05 pm PDT

Our Academic Village partners at the University of San Francisco and Boys & Girls Clubs of San Francisco help local children...

S.F. schools are cutting extracurri...



Engagement Rate (per Impression)	**11.6%**
Impressions	**190**
Engagements	**22**

Partner news coverage

San Francisco's Academic V...
Tue 6/3/2025 2:35 pm PDT

The seismic upgrade of historic McAllister Tower is the subject of an article in STRUCTURE magazine, published for the...

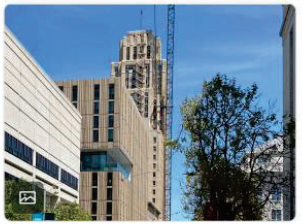


Engagement Rate (per Impression)	**9.5%**
Impressions	**2,304**
Engagements	**220**

Partner news coverage

San Francisco's Academic V...
Tue 5/27/2025 2:47 pm PDT

Great news for the UC Law San Francisco Academic Village! Governor Gavin Newsom's May Revise budget plan reaffir...



Engagement Rate (per Impression)	**9%**
Impressions	**5,161**
Engagements	**467**

Advocacy

Academic Village Showcase Page

Audience growth since launch in January 2025

Published Posts

Review the lifetime performance of the posts you published during the publishing period.

Post	Published Date	Impressions	Average Reach per Post	Average Potential Reach per Post	Engagement Rate (per Impression)	Engagements	Reactions	Comments	Shares	Saves	Post Link Clicks
11 Posts Apr 15, 2025 – Aug 10, 2025		**17,178** ↗82.1%	— —	— —	**12%** ↗39.1%	**2,059** ↗153.3%	**565** ↗130.6%	**23** ↗283.3%	**41** ↗70.8%	**0** →0%	**1,430** ↗165.8%
10 Posts Jan 1, 2025 – Apr 14, 2025		**9,432**	—	—	**8.6%**	**813**	**245**	**6**	**24**	**0**	**538**

Questions?

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(415) 565-4615
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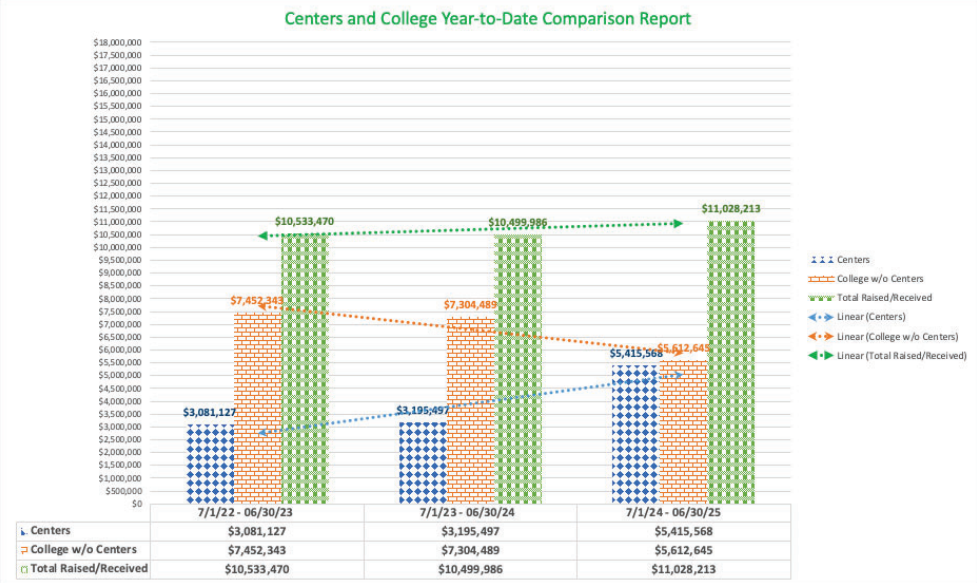
To: UC Law SF Board of Directors
From: Chief Advancement Officer, Julia Jordan
Date: September 3, 2025
Re: Advancement Report for September 12 Board of Directors Meeting

Overview

The first quarter of the 2025/2026 fiscal year is off to a good start. The top priority across fundraising remains the Comprehensive Campaign and within engagement, we're launching two new chapters before the end of September. I'm providing below an update on recent and upcoming activities.

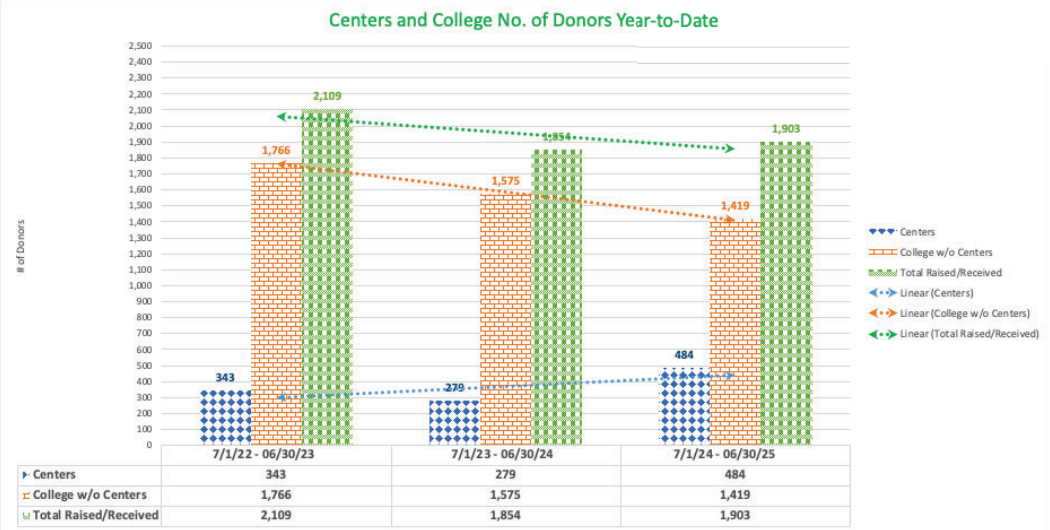
Fundraising

Please find below a report on FY 2024/2025. The Year/Year comparison is for the same timeframe from the 2022/2023 fiscal year and 2023/2024 fiscal year. Fundraising progress remains consistent year over year.



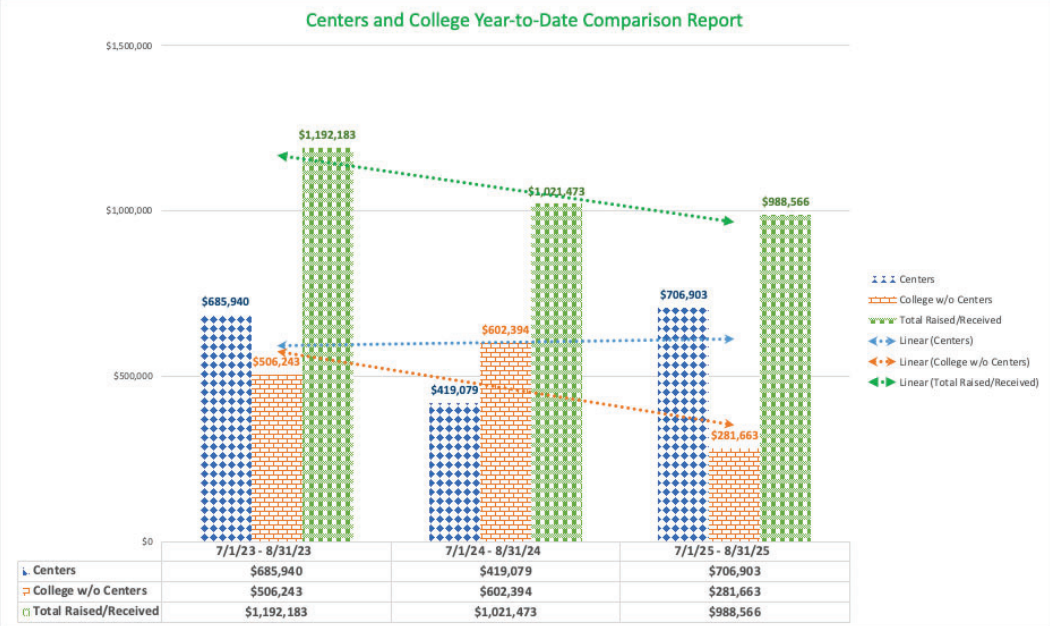
	7/1/22 - 06/30/23	7/1/23 - 06/30/24	7/1/24 - 06/30/25
Centers	$3,081,127	$3,195,497	$5,415,568
College w/o Centers	$7,452,343	$7,304,489	$5,612,645
Total Raised/Received	$10,533,470	$10,499,986	$11,028,213

Below is the latest summary of Year-to-Date donor counts over the same time period as the above graph.



	7/1/22 - 06/30/23	7/1/23 - 06/30/24	7/1/24 - 06/30/25
Centers	343	279	484
College w/o Centers	1,766	1,575	1,419
Total Raised/Received	2,109	1,854	1,903

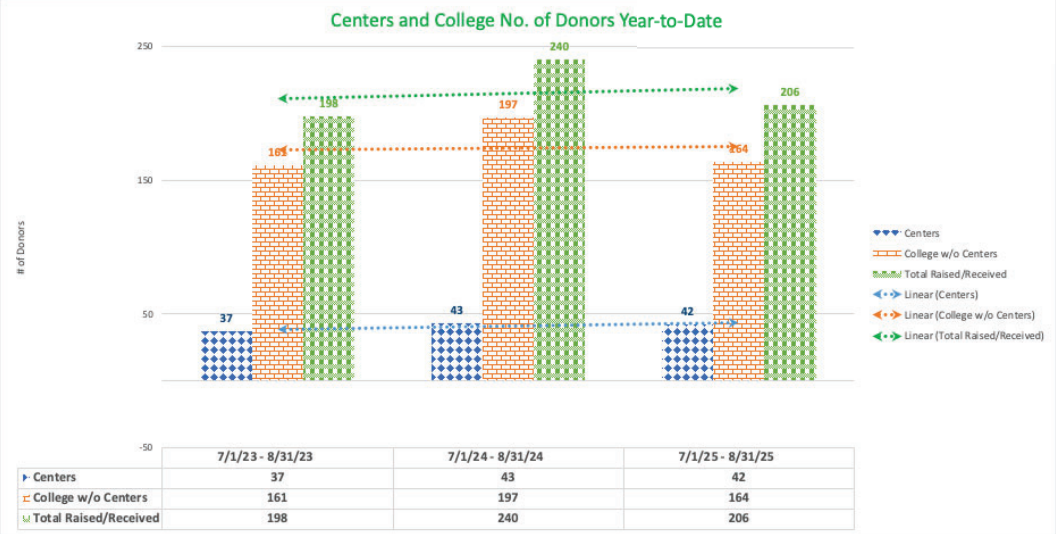
I'm including below a report on fundraising through August 31, 2025. The Year/Year comparison is for the same timeframe from the 2023/2024 fiscal year and 2024/2025 fiscal year.



	7/1/23 - 8/31/23	7/1/24 - 8/31/24	7/1/25 - 8/31/25
Centers	$685,940	$419,079	$706,903
College w/o Centers	$506,243	$602,394	$281,663
Total Raised/Received	$1,192,183	$1,021,473	$988,566

Note that it is still very early in the fiscal year and we'll continue to report on trends and key gits as the year continues.

Below is the latest summary of Year-to-Date donor counts over the same time period as the above graph.



	7/1/23 - 8/31/23	7/1/24 - 8/31/24	7/1/25 - 8/31/25
Centers	37	43	42
College w/o Centers	161	197	164
Total Raised/Received	198	240	206

In the August 21 Committee Advancement and Communications meeting, we discussed the above financials, including some key wins and continued opportunities for fundraising growth. I also provided an update on hiring for some key roles on the Advancement Team. Moreover, we discussed the Comprehensive Campaign, including fundraising plans and high-level strategies through the end of the calendar year.

Alumni Engagement
We're hosting a number of alumni engagement opportunities in August in September. Highlights include launch two new chapters in Japan and Sacramento. We're grateful to our alumni and faculty leadership for their support in launching these new chapters, which are great ways for alumni in those areas to engage. I'm including here some of our recent and upcoming alumni events.

- August 20: Berkeley Law/UC Law SF Mixer
- August 31: Japan Chapter Launch
- September 4: Portland Alumni Event
- September 18: Sacramento Chapter Launch
- September 25: Fresno Alumni Chapter Event

Team Update
We were thrilled to welcome Paul Rafael to our team as Major Gifts Officer in August. Paul brings a strong career as a fundraising, most recently at Teach for America and University of California, San Francisco. Additionally, we're eager to have Ashely Judilla join the Advancement team as Alumni Engagement Program Manager on September 8. Some of you may know Ashley from her role as Academic Program Services Coordinator. I'm grateful to have Paul and Ashley joining the team to support our fundraising and engagement goals.

Report 5.2.1 – Strategic Priorities in the Academic Division in AY25-26

By Provost & Academic Dean Morris Ratner

At the start of each academic year since the Board of Directors and Chancellor & Dean adopted the March 2020 Operational Strategic Plan,[1] I have submitted a quarterly report highlighting implementation priorities for the year in the academic division. At the end of each academic year, I have reported about the degree to which those priorities were achieved or advanced. As the College has engaged in successive rounds of supplemental strategic planning on topics identified below, I have layered in reporting on implementation and achievement of supplemental plan goals. This first report of the new 2025-2026 academic year (AY25-26) continues that practice and cross references to prior reporting where appropriate.

I. 2020 Operational Strategic Plan – Reporting and Continued Implementation

The 2020 plan included a refreshed mission statement.[2] The 2020 plan focused on five interconnected topics related to that mission statement, i.e., student development and fulfillment, scholarly excellence, community cohesion, the Academic Village, and financial health and organizational capacity. For each topic, the 2020 plan articulated multiple goals, strategies, and initiatives. That plan has served as the College's lodestar for action and reporting since the Board of Directors and Chancellor & Dean adopted it in March 2020.

A. Summary Reporting

In coordination with the Board of Directors, the Chancellor & Dean has constituted a new Supplemental Strategic Planning Working Group on Federal Policy Impacts and Institutional Planning, referenced in Section V, below, to address federal policy changes including, significantly, changes to federal loan programs.[3] In connection with that effort, Dean Faigman charged Chief Financial Officer David Seward and Provost & Academic Dean Morris Ratner, the co-chairs of the working group that developed the 2020 plan, with the task of preparing a final report on 2020 plan implementation. That report is due this month. It will show that the strategies and initiatives developed in 2020 have largely been implemented; however, as explained in Section I.B, below, the College continues to adopt new initiatives aimed at achieving the 2020 plan that were not explicitly contemplated by that plan. Relatedly, the College has engaged in

[1] *See* https://uclawsf.app.box.com/s/9jg7kvzi3iict4la0ooug3s6k6bm56p5.
[2] UC Law SF's mission statement: "UC Law SF serves society as a center of higher learning committed to exceptional teaching, influential scholarship, and exemplary public service. We provide a rigorous, innovative, and inclusive legal education that prepares diverse students to excel as professionals, advance the rule of law, and further justice." *See* https://www.uclawsf.edu/home/aba-required-disclosures/.
[3] *See* Angie Harris, Financial Aid Sharknet information page (July 22, 2025) (https://uclawsf--simpplr.vf.force.com/apex/simpplr__app?u=/site/a0i4100000CZX0xAAH/page/a0cKh00000HMSkIIAX); Nancy Conneely & Derek Brainard, New Rules for Law School Loans: Limits, Repayment Plans and What You Need to Know, AccessLex Institute (July 17, 2025) (https://www.accesslex.org/news-tools-and-resources/new-rules-law-school-loans-limits-repayment-plans-and-what-you-need-know).

supplemental planning to address major new opportunities and threats on topics as varied as the pandemic, the campus climate and academic freedom, generative AI, and student success. While the forthcoming final report will focus on 2020 plan implementation, Sections II-V, below, provide updates regarding supplemental planning efforts.

B. Academic Program Strategic Priorities in AY25-26 that Further 2020 Plan Goals

Though the specific strategies and initiatives outlined in the 2020 plan have largely been implemented, the College continues to pursue 2020 plan goals by developing and implementing new strategies and initiatives. The following subsections briefly sketch strategic priorities in AY25-26 that further 2020 plan goals but were not specifically enumerated as initiatives in the 2020 plan. To help situate new board members, it may make sense to define the term "academic division." Chancellor & Dean Faigman has divided College operations into three main divisions for administrative purposes: The Chancellor & Dean directly oversees non-academic operations, including functions such as admissions, HR, IT, the General Counsel's Office, alumni engagement and fundraising, and security. The academic division is headed by the Provost & Academic Dean who reports to the Chancellor & Dean; the academic division includes faculty, the curriculum, student affairs, academic program units like academic support and career development, the Registrar's Office, degree program management, and research support, including the College's grants operation. The third division is headed by the Chief Financial Officer and is responsible for the College's budget management and fiscal health. Board standing committees line up with this internal reporting and administration structure; the Educational Policy focuses primarily on academic division matters.

1. Student Success

In addition to implementing last year's supplemental strategic planning regarding student success (discussed in Section II.A., below), a primary goal in the coming academic year is to pivot instruction and assessment to the next generation of bar exam. A new bar exam may be administered within two years of the date on which the Bar releases details about that exam's content and format, meaning that the 1Ls matriculating in Fall 2025 may take an exam that looks different from the exam that prior generations of graduates took.

On October 10, 2024, the California Supreme Court issued an Administrative Order sketching the contours of a new California Bar Exam.[4] As previously reported,[5] that new exam will involve a different array of subjects, a purportedly smaller universe of issues within each subject, and a greater emphasis on lawyering skills. The Court ordered the

[4] *See* https://www.calbar.ca.gov/Portals/0/documents/admissions/Examinations/California-Supreme-Court-Admin-Order-2024-10-10.pdf.
[5] *See* Morris Ratner, *et al.*, Educational Policy Committee Report 4.2 re "California Bar Exam Developments" (November 21, 2024) (https://repository.uclawsf.edu/cgi/viewcontent.cgi?article=1059&context=board_materials_2024).

Committee of Bar Examiners to develop more detailed plans that could be disclosed to law schools within the two-year period required by statute so that law schools have some time to prepare students for the new exam. In the same period, also as previously reported,[6] California attempted to develop an alternative to the National Conference of Bar Examiners (NCBE)'s Multistate Bar Exam (MBE) to save funds by allowing remote administration of exams. The State Bar's first attempt to implement that plan in February 2025 was plagued by technical errors and other issues,[7] though it corresponded with historically high pass rates for the law school and for test-takers statewide.[8] In the wake of that, the Court ordered a return to using the NCBE's MBE and to in-person administration for the July 2025 administration of the California Bar Exam. The July administration is the subject of accompanying Report 5.2.2. Deans of ABA-accredited law schools in California recently wrote to the State Bar urging adoption of the NCBE's NextGen Uniform Bar Exam (supplemented by California-specific questions) by 2028, instead of attempting to create a new bar exam from scratch.

Against this backdrop, UC Law SF is confronting the question of how we should adapt our academic program now considering what we know or at least suspect the new bar exam will entail, recognizing that the NCBE's NextGen Uniform Bar Exam[9] likely provides a template even if California does not end up accepting the ABA deans' recommendation. Toward that end, I constituted and chair a Bar Pivot Working Group[10] that spent the summer planning an October 3 fall faculty retreat focused on formative and summative assessment, with special emphasis on anticipated and new bar testing methods. (Associate Dean for the Office for Academic Skills Instruction and Support Jennifer Freeland has taken the lead on retreat preparation.) Dean Freeland and I have partnered to create additional resources for faculty, including links to sample NextGen UBE questions posted by the NCBE.[11]

This year and in coming years, the Bar Pivot Working Group and full faculty will also assess design changes made after 2016 to restructure the 1L and upper division curricula to determine if further changes should be made to ensure students are prepared for the new bar exam. Program design elements on the table for reconsideration include the Sack program, the 1L legal writing program, and upper division required courses, which currently do not account for new bar subjects like Family Law and Employment Law, enrollment in which remains low despite recent advising efforts. Some changes can be made administratively. For example, Dean Freeland has discretion to adjust Sack

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[6] *Id.*
[7] *See* Morris Ratner, *et al.*, Board of Directors Report 6.2.1 re "Bar Passage" (March 13, 2025) (https://repository.uclawsf.edu/cgi/viewcontent.cgi?article=1011&context=board_materials_2025).
[8] *See* Morris Ratner, *et al.*, Educational Policy Committee Report 4.3 re "Bar Success" (May 22, 2025) (https://repository.uclawsf.edu/cgi/viewcontent.cgi?article=1025&context=board_materials_2025).
[9] *See* https://nextgenbarexam.ncbex.org.
[10] Bar Pivot Working Group members include in addition to Deans Ratner and Freeland, Director of Bar Passage Support Margaret Greer, Associate Director of Bar Passage Support Dan Martin, Bar Success Analyst Stefano Moscato, Faculty Executive Committee Chair Emily Murphy, Associate Dean for Experiential Learning Gail Silverstein, Clinical Professor Mai Linh Spencer (who served on the Blue Ribbon Commission that proposed changes to the California Bar Exam the Supreme Court ultimately mostly adopted), and Director of Legal Research & Writing Angie Gius.
[11] *See* https://www.ncbex.org/exams/nextgen/sample-questions.

Program guidance and templates without faculty action. Other changes, such as possible changes to course requirements, may require faculty action.

2. Academic Program Elements that Positively Contribute to Fiscal Health and Organizational Capacity

Budget challenges addressed in prior reporting in the Finance Committee reinforce the benefits of continuing to emphasize and pursue elements of the 2020 Operational Strategic Plan focused on growth and increasing capacity. In the coming academic year, we'll emphasize two – grant funding[12] and growth of master's degree programs.[13]

a. Grants

Third-party funding supports the research and public service elements of the law school's mission. Accompanying Report 5.2.4 provides a summary of sponsored research fundraising in fiscal year (FY) 2025 and over the period since the 2020 plan was adopted. It demonstrates that sponsored research funding activities were robust despite turmoil in federal funding of higher education research nationally. In AY25-26, the strategic priority for the research centers whose efforts generate most of the College's sponsored research funding will need to adapt to a changed funding landscape that entails less federal support for research and more competition for non-federal funding.

b. Asynchronous Master's Degrees

Since the Board and Chancellor adopted the 2020 Plan, the College has revived the asynchronous Health Policy & Law degree that we jointly offer with UCSF. In addition, we have created an asynchronous track within the non-lawyer Master of Legal Studies degree program. This year, we are exploring creating an asynchronous track in the LL.M. degree program, which would be effectuated in partnership with West Academic/BarBri. Associate Dean for Global Programs Binyamin Blum is leading this effort. Dean Faigman has funded a new term-limited (contract) faculty line, Associate Director of the LL.M. Program, to help launch this effort, and we have hired new contract faculty member Luis Bergolla[14] to serve in that role. Professor Bergolla started on September 1 and brings with him substantial prior experience supporting peer law schools' asynchronous master's degree programs.

3. Community Cohesion/Climate

Planning priorities for the coming year are covered in Section IV, below, because this topic was the subject of supplemental strategic planning after March 2020.

[12] Initiative 2.1.3.2 of the 2020 plan was to "Build grants development and management capacity to attract and support top scholars." And Strategy 5.5.2 was to "continue enhancement of grants management function."
[13] Strategy 5.5.3 of the 2020 Plan was to "enhance non-JD admissions efforts."
[14] *See* https://law.stanford.edu/luis-bergolla/.

II. Implementing AY24-25 Supplemental Planning – Student Success

A. Bar Success

After the fall 2024 Board-faculty retreat, the faculty Academic Standards Committee and full faculty investigated and ultimately adopted policy changes last year in the following areas: grading policies, formative assessment requirements, and GPA-based interventions (supportive requirements for students whose law school GPAs place them in the third and fourth quartiles).[15] This year, these new policies need to be implemented. I will report on implementation later this year.

B. Employment

The most significant change on the hiring landscape is the move to concentrate hiring through direct application to law firms; this process precedes and has taken much of the wind out of the sails of what used to be the primary vehicle for big firm hiring, "On Campus Interviews" (OCI). Assistant Dean of the Career Development Office Amy Kimmel's section of accompanying Report 5.2.2 provides an update and explains plans for continuing to educate and prepare students for the new process in AY25-26.

III. Implementing AY23-24 Supplemental Planning – AI

We comprehensively reported on supplemental plan implementation in a report submitted for the March 13, 2025 Board of Directors meeting.[16] Since that time, I have formalized the working group that is guiding internal plan implementation.[17] That group met most recently on July 30, 2025, to share information about progress on various initiatives being pursued across the academic division. Here are some highlights:

Advisory Board: Director of Applied Innovation Tal Niv has begun recruiting members to serve on a Technological Innovation in Legal Practice & Education Advisory Board. Starting this academic year, this board will bring together a select group of expert and visionary leaders of the legal profession to advise UC Law SF as we chart the

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[15] *See* Morris Ratner, *et al.*, Educational Policy Committee Report 4.2 re "Student Success Initiatives" (May 22, 2025) (https://repository.uclawsf.edu/cgi/viewcontent.cgi?article=1025&context=board_materials_2025); Morris Ratner, *et al.*, Educational Policy Committee Report 4.1 re "Bar Passage" (February 27, 2025) (https://repository.uclawsf.edu/cgi/viewcontent.cgi?article=1009&context=board_materials_2025).

[16] *See* Morris Ratner, Board of Directors Report 6.2.3 re "Supplemental Strategic Plan re Generative AI" (March 13, 2025) (https://repository.uclawsf.edu/cgi/viewcontent.cgi?article=1011&context=board_materials_2025).

[17] In AY25-26, this faculty working group includes, in addition to me, Director of Applied Innovation Tal Niv, Director of LexLab Drew Amerson, Director of the Center for Negotiation and Dispute Resolution Hiro Aragaki, Assistant Direct of the Center for Innovation Paul Belonick, Faculty Director of the Center for Innovation and the AI Law & Innovation Institute Robin Feldman, Associate Dean for OASIS Jennifer Freeland, Director of LRW Angie Gius, Clinical Professor Brittany Glidden, Library Director Hilary Hardcastle, Deb Scholar Zac Henderson, Chief Communications Officer John Kepley, Assistant Dean Amy Kimmel, Distinguished Professor Jodi Short, Associate Dean Camilla Tubbs, and Assistant Dean of Student Services Miguel Zavala.

future of legal education in an era shaped by AI and automation. The advisory board will focus on some of the most pressing questions we face:

- How is the profession changing due to the emergence of new technology, including artificial intelligence? What is the pace of adoption? What tools are most in use currently?
- How do we think technological innovation will affect the legal profession in the medium-term or long-term?
- How are technological changes impacting current models for providing legal services, including hiring and training of new lawyers?
- What new knowledge and skills should law students acquire before they graduate to be prepared for this evolving legal services environment?
- Are there opportunities for UC Law SF and practitioners to partner to ensure students acquire such knowledge and skills?

Advisory board members will meet twice annually - in the fall and spring semesters - with the Chancellor & Dean, Provost & Academic Dean, faculty leaders from tge Center for Innovation (C4i) and LexLab, and other members of our academic leadership.

Professional Development Programming. This past summer, Professor Niv and Director of LexLab Drew Amerson piloted a weeklong summer program for professionals on AI during the week of July 21 to earn a certificate of completion in Law and AI and 30 hours of continuing legal education. The program is posted on the LexLab website,[18] as are profiles of program faculty.[19] LexLab is editing and will post videos of the program segments which will be shared internally with community members on Sharknet.

1L Programming. This year, 1L programming includes the following: (1) a panel on AI and the legal profession during the first day of 1L general JD orientation; (2) a program that is integrated in the "1L Essentials" co-curricular professional development program on the same topic; and (3) LRW1 instruction, including an AI-related exercise in the fall term, and a possible addition of instruction in the spring LRW2 class. 1Ls also can attend and participate in LexLab special "free hour" programs throughout the academic year.

Further Updates to the Technology Law and Lawyering Concentration. In her second year in the Director of Applied Innovation role, Director Tal Niv has continued to update the technology concentration. The concentration is described in the online Course Catalog.[20] It serves as a guided course of study for upper division students interested in specializing in technology law and lawyering, and it also serves as a roadmap to the curriculum for those students who, while not earning a concentration certificate, nevertheless want to take specific classes within the concentration.

[18] *See* https://lexlab.uclawsf.edu/laic-program.
[19] *See* https://lexlab.uclawsf.edu/laic-faculty.
[20] *See* https://uclawsf.catalog.prod.coursedog.com/jdc/jdc#technology-law-and-lawyering1.

Research and Scholarly Contributions. The center of gravity for AI scholarship on campus is the AI Law & Innovation Institute.[21] One example of the speed with which it is establishing a presence in this area is the publication of Distinguished Professor Robin Feldman's new book on AI and IP.[22]

Pervasive Instruction. Given the effects of AI on lawyering, I shared resources with all Legal Ethics and Professional Responsibility faculty, including a model PowerPoint template created by Assistant Director of the Center for Innovation and Professor of Practice Paul Belonick and scholarship that could ground class discussions of the intersection of AI and the law governing lawyers. The College is continuing to facilitate the exchange of teaching ideas among faculty, e.g., by asking faculty to report in their annual reports on the degree to which they are integrating AI into their teaching and sharing the results of that reporting with all faculty.

IV. Implementing AY21-22 Supplemental Planning – Community Cohesion

A community experience (i.e., climate) survey was a key element of the 2020 Operational Strategic Plan section on community cohesion. That survey was completed and shared with the community in spring 2021. In AY2021-2022, a working group established by the Chancellor & Dean engaged in supplemental strategic planning to reflect on the survey results and consider possible interventions to improve the campus climate. Several initiatives grew out of that process, including hiring the College's first Ombudsperson,[23] posting information for students on how to formally or informally resolve disputes,[24] and the creation and publication of Principles of Community.[25]

The survey and supplemental planning identified additional cross-cutting initiatives that we will continue to prioritize in the academic program this year. First, since 2020, the College has invested substantial resources bolstering its commitments, co-curricular educational programming, and policies pertaining to free speech and academic freedom, which are cornerstones of community cohesion. In AY25-26, we will implement the newly adopted free speech policy adopted in March 2025,[26] and the faculty will continue to deliberate about how best to protect academic freedom in a period during which core principles appear to be under stress. Second, in AY25-26 the College will continue to adapt to the recent departure of our Chief Diversity Officer Mario Lopez, with Assistant Dean for LEOP Elizabeth McGriff taking on some DEI-related functions and a new hire taking over the First Generation Program.

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[21] *See* https://www.uclawsf.edu/center-for-innovation/ai-law-innovation-institute/.
[22] *See* https://www.cambridge.org/core/books/ai-versus-ip/753B0C776CBB12D667E557506BF21089.
[23] *See* https://uclawsf--simpplr.vf.force.com/apex/simpplr__app?u=/site/a0i6T00000bL5tcQAC/dashboard.
[24] *See* https://uclawsf--simpplr.vf.force.com/apex/simpplr__app?u=/site/a0i4100000GGGWeAAP/page/a0c6T00000SoBMuQAN.
[25] *See* https://www.uclawsf.edu/community-principles/#:~:text=We%20strive%20to%20create%20an,learn%2C%20work%2C%20and%20serve.
[26] https://uclawsf--simpplr.vf.force.com/apex/simpplr__FileDetail?fileId=0696T00000bh5yOQAQ&siteId=a0i4100000GGGWeAAP.

A. Free Speech and Academic Freedom

The faculty adopted an updated Academic Freedom Policy in the spring of 2023.[27] The Board of Directors adopted an Interim Academic Freedom Grievance Policy and an Interim Policy on Free Speech at its June12, 2025 meeting.[28] We are advertising those new (2025) policies this year and assessing their implementation.

Last year's Faculty Executive Committee (FEC) asked the Provost & Academic Dean to continue to focus attention on faculty member concerns that unpopular but otherwise lawful speech may result in negative consequences for them. Toward that end, Provost & Academic Dean Morris Ratner, Dean of Students Tiffany Gabrielson, and GC John DiPaolo are working with prior-year FEC member Keith Hand, who also co-chaired the ad hoc committee that produced the current version of our Academic Freedom Policy, to lead a faculty conversation this year about the legal and policy boundaries of protected speech in the classroom setting.

B. Diversity, Equity & Inclusion (DEI) in AY25-26

1. New DEI Dean

Chief Diversity Officer Mario Lopez left the College in the spring of this year. Assistant Dean for the Legal Education Opportunity Program Elizabeth McGriff ('96) agreed to take on an additional role starting July 1, 2025 as Assistant Dean for Diversity, Equity & Inclusion, essentially taking over the College-wide diversity functions Mario performed. In that capacity, she will collect and share information about diversity, equity, and inclusion ("DEI") with the community, report and help the College brainstorm about new DEI initiatives, hone and share her already-considerable expertise on DEI matters, build community partnerships, and take over as Chair of the Chancellor & Dean's Diversity Equity & Inclusion Working Group ("DEIWG"). Dean McGriff's new title is "Assistant Dean for the Legal Education Opportunity Program and Assistant Dean for Diversity, Equity & Inclusion." In her capacity as Assistant Dean for DEI, Dean McGriff reports directly to the Chancellor & Dean. She will continue to report to the Provost & Academic Dean for LEOP-related matters.

2. First Gen Program Reboot

In coordination with the Provost & Academic Dean, former Chief Diversity Officer Mario Lopez launched and ran the First Generation Program at UC Law SF. After Chief Diversity Officer Mario Lopez's departure, we broke out that facet of his former role and executed a hiring process for a part-time First Generation Program director to start this

[27] *See* https://uclawsf--simpplr.vf.force.com/apex/simpplr__app?u=/site/a0i4100000GGGWeAAP/page/a0c2M000000qDh33QAC.
[28] *See* David Faigman, et al., Board of Directors Report 6.2.1.5 re "Interim Policy on Free Speech" (June 12, 2025) (https://repository.uclawsf.edu/cgi/viewcontent.cgi?article=1023&context=board_materials_2025).

summer. Adjunct Professor and Meta Associate GC, AI Product Ernest Hammond III agreed to serve as the next Director of the College's First Generation Program. He started on July 21 and is leading a special 1L first generation student orientation session the week of August 11. Director Hammond reports to the Provost & Academic Dean. He will effectively reboot and reimagine that popular program starting this academic year.

V. Supplemental Planning in AY25-26 – Federal Policy Changes

As noted, supplemental planning is taking place this year that focuses on, among other topics, changes in federal policies pertaining to graduate education financing. Reporting on this will likely take place primarily in other Board committees (e.g., Finance) or at the Board of Directors level. It is referenced here primarily to place it in the context of multiple years of supplemental planning.

Report 5.2.2 – Student Success

By Provost & Academic Dean Morris Ratner, Director of Bar Passage Support Margaret Greer, Associate Director of Bar Passage Support Dan Martin, and Assistant Dean for Career Development Office Amy Kimmel

I. Bar Success

Accompanying Report 5.2.1 addresses implementation of last year's supplemental strategic planning on student success and additional initiatives associated with anticipated changes to the California Bar Exam. This section of this report focuses more narrowly on Class of 2025 preparedness for the July 2025 administration of the California Bar Exam.[1]

Bar Success Analyst Stefano Moscato shared the following information about the Class of 2025's preparedness levels for the July administration of the California Bar Exam. Recall that last year's Class of 2024 first-time bar pass rate on the July 2024 administration of the California Bar Exam was near historic highs at 84%.[2] In addition to law school cumulative GPA, percentage of post-graduate bar study completion (what I loosely call "bar preparedness") is one of the most powerful predictors of first-time bar passage. That explains why, using it last year, Professor Moscato was able to predict our first-time pass rate on the July 2024 administration before we received pass/fail data from the State Bar. Professor Moscato tracked student progress in post-graduate bar study this summer. He reports that the Class of 2025 achieved higher preparedness levels than did the Class of 2024, which is a good sign:

> Here's how the data compare to last year's cohort:
> - 80.5% average course completion vs. 79.8% last year.
> - Critically, only 17 grads completed less than 50% of their course (including 5 below 25%), vs. 30 (and 11 sub-25%) last year.
> - Average of 1,036 supplemental MBEs attempted (vs. 827 last year), including 572 questions in the last three weeks (vs. 508 last year). 324 of 340 grads attempted at least 100 questions, vs. 316/345 last year.
> - Among those who took their commercial bar course's full day simulated MBE test, the average score was 125.1 (vs. 124.6 last year). And many more grads heard our messaging on the importance of taking this simulated exam: Only 41 grads did not take it (and 6 others took only the morning portion), vs. 61 non-takers plus 11 morning-only last year.
> - 225/340 grads submitted at least one BEST essay, vs. 214/345 last year. 1,240 total essays submitted, vs. 1,148 last year.
> - All of that increased supplemental work translates to a 94.4% "effective" course completion rate, vs. 90.9% last year.

[1] Unlike the February administration, which was on a different platform and used Kaplan questions, the July administration was on the prior platform (ExamSoft) and used NCBE questions, and was in-person, and we are not aware of significant administration issues. Our graduates report that the exam went smoothly.

[2] *See* Morris Ratner, *et al.*, Educational Policy Committee Report 4.1 re "Bar Passage" (February 27, 2025) (https://repository.uclawsf.edu/cgi/viewcontent.cgi?article=1009&context=board_materials_2025).

Since the population whose odds most greatly increase when following our suggested study approach is the sub-3.2 GPA cohort, it bears mentioning that the gap between this year and last year is even more pronounced here:

- 74.9% course completion & 86.9% effective course completion, vs. 73.7% & 82.7% last year.
- 891 supplemental MBEs attempted, vs. 674 last year.
- 117.2 vs. 113.7 average score on the simulated MBE. 31 non-takers (and 2 morning-only) vs. 40 non-takers (and 6 morning-only takers) last year.

The LEOP Class of 2025 cohort preparedness statistics were even better. According to Professor Moscato, LEOP Class of 2025 graduates achieved the following during bar study this past summer:

- 81.8% course completion.
- 1123 supplemental MBE questions, 584 in the final three weeks.
- 93% participation in BEST, accounting for over 25% of the essays submitted.
- 97.2% effective course completion.

Of course, while preparedness is a powerful predictor, it is just that, a predictor. Actual pass rates will not be known until results are released in November.

Graduate preparedness levels are a function of the readiness we create over a three-year course of study. But they also reflect the incredible efforts of our bar success team leadership, Director of Bar Passage Support Margaret Greer, Associate Director of Bar Passage Support Dan Martin, and, for LEOP grads, new OASIS Professor of Practice Heather Varanini and this past year, outgoing Professor of Practice Richard Sakai. Their work each summer is informed by data analyses Professor Moscato provides throughout the summer. They deserve our gratitude for what amounts to a 10-week marathon of individual coaching of hundreds of graduates each year.

II. Employment

Assistant Dean Amy Kimmel leads the Career Development Office and prepared the text in this section of this report.

A. Class of 2025 Employment (Year Over Year Data)

The Career Development Office (CDO) captures employment data for the graduation class at the start of every month on our graduate tracking sheet. Our graduate tracking sheet includes anyone who has not given us all the information required for reporting so it is possible that a graduate's status may change in the coming months.

- August 1, 2025: 125/359[3] (35% are unemployed and/or we do not have complete data on their employment status).[4]
- August 7, 2024: 180/ 366 (49% are unemployed and/or we do not have complete data on their employment status).
- August 16, 2023: 154/345 (44% are unemployed and/or we do not have complete data on their employment status).
- August 3, 2022: 134/309 (43% are unemployed and/or we do not have complete data on their employment status).

B. Recruiting Trends

1. Big Law Recruiting

Big Law hiring has changed dramatically in the last year and a half. Law firms now do the bulk of their recruiting through direct applications to their firms (rather than through early or traditional OCI Programs).[5] To respond to these changes, we offered increased resources and workshops throughout the spring for students, and we offered firms a pre-OCI program in the first week of June and a more traditional OCI program in the last week of July. The numbers of firms participating in the pre-OCI program rose slight from last year (up to 36 from 28) and the number of firms in the more traditional summer OCI program was down from last year (29[6] down from 40). This is down from the 70+ employers who participated in the traditional summer OCI in 2023.

Over the next two months, we will gather data both from our students as well as from our national and local professional organizations to better understand the recruiting trends from this past summer and to plan for next summer. Likely, the role of OCI will continue to decrease. In response to these shifts, we are providing firms and students more opportunities to connect earlier in the first year. We are hosting two networking events featuring employers from all sectors (with ample representation from Big Law) as part of our 1L Essentials programming. One of the spring mandatory 1L Essentials (Academic Regulation 708 Professional Development Program) events will prepare students for 2L summer recruiting. Additionally, we will provide more resources to students about how best to research and identify these opportunities when they are available.

These shifts are not without challenges for students. They may be navigating a 1L summer and 2L summer job search at the same time. Students may be forced to make decisions about 2L summer (and by extension their post-graduation career) at an earlier stage before they have really explored all the practice areas. This shift to direct

[3] Additionally, the class size is not confirmed; May and August graduates are still being processed so the denominator (Class of 2025 class size) may change.
[4] We expect this lower number is in large part to our improved data collection practices.
[5] Per NALP, direct applications were the most prevalent recruiting method in 2024 (as opposed to traditional OCI in 2023). The summer 2024 recruiting cycle saw firms participate in OCI at fewer schools than the previous cycle.
[6] This number also included a higher than usual number of mid-size firms and DA offices.

applications requires a higher level of self-direction in the job search without the more systematized and "one-stop-shop" process of OCI. This continues to be a particular challenge for first-generation and other students who are not familiar with these firms, do not have a large network of lawyers, and to whom all of this is very new. We will continue to partner with LEOP and the First-Gen Program to ensure this information is getting to our students.

2. Government Hiring

The federal Department of Justice Honors Program is happening this year despite a very late start and the continued hiring freeze at the federal level.[7] Almost all the formal positions are with the Executive Office of Immigration Review (103 out of the 118 spots). This is a marked increase from years past; typically, EOIR make up 20-30 positions. The rest of the positions are mainly within Civil Division. Positions at U.S. Attorney's Offices are only open to graduates who've already passed the bar or are waiting on their results—they aren't available to current students. The Presidential Management Fellows program (another good pathway into post-graduate federal government work) was terminated.

We are continuing to monitor the federal hiring and its potential impact on the market both on state level jobs and on the market broadly as more government attorneys are forced to pivot to other practices and/or sectors.

[7] The formal positions in the Honors Program have received hiring freeze exemptions.

Report 5.2.3 – Centers

By Provost & Academic Dean Morris Ratner

The 2020 Operational Strategic Plan identified as a "cross-cutting initiative" the goal of expanding the law school's centers and programs of excellence. As previously reported, the College has significantly expanded the number of programs and centers. This year, in academic year (AY) 2025-2026, Chancellor & Dean David Faigman is launching a new Center for Constitutional Democracy. However, this report is backward looking. Each year since 2020, I have shared center annual reports covering the prior year and highlighting their activities.[1] While not all reports have been finalized for AY 2024-2025, the sampling attached this this report shows the breadth and impact of our centers' work. Attached please find the following reports for the last academic year:

- Center for Gender and Refugee Studies.
- Center for Innovation.
- Center for Litigation and Courts
- Center for Negotiation and Dispute Resolution.
- Center for Race, Immigration, Citizenship & Equality.
- Center for Racial and Economic Justice.
- Center for Social Justice.
- Equality Action Center.
- International Development Law Center.
- LexLab.
- UCSF/UC Law Consortium.
- WorkLife Law.

You can also find online versions of the following additional center reports: the Center for Business Law[2] and the Center for East Asian Legal Studies.[3]

[1] *See* https://www.uclawsf.edu/academics/centers/.
[2] *See* https://www.icontact-archive.com/archive?c=272315&f=49892&s=56728&m=828149&t=e21c46406720c3197d8e879bc8cb48451b56d0d4f789b335b26937dbc556968b.
[3] See https://www.uclawsf.edu/east-asian-legal-studies/.





2024-2025 ANNUAL REPORT



FACULTY DIRECTOR

PROFESSOR KAREN MUSALO

MESSAGE FROM THE DIRECTOR

The Center for Gender & Refugee Studies (CGRS) works to ensure that the United States lives up to its international and domestic legal obligations to protect individuals fleeing persecution. We provide training, expert consultation, and resources to attorneys who represent asylum seekers so that they can obtain the best outcome in individual cases, while we litigate and are engaged in research and policy advocacy to impact the development of the law. CGRS is a nationally and internationally recognized source of expertise and is a frequent reliable source for scholars and journalists writing on refugee issues. This year, CGRS is proud to celebrate 25 years of pursuing justice for those fleeing violence, persecution, and the escalating impacts of climate change around the world.

I founded CGRS after achieving the groundbreaking victory in *Matter of Kasinga*, which was the first precedent decision establishing that women fleeing gender-based persecution could be eligible for asylum in the United States. Although CGRS's initial mission was on behalf of refugee women, we have expanded to protect all those who suffer human rights violations and arrive at our borders seeking the protection guaranteed by U.S. law, and our international obligations.

The global trend by rich industrialized countries—including the United States—has been to turn back asylum seekers, resulting in tragic deaths at the border, and at sea. We work to counter policies that violate the right to *non-refoulement* (non-return) to persecution. We harness our skills as scholars, educators, litigators, and policy experts to restore and reimagine access to asylum, providing refugee communities a fair chance to live in safety and dignity.

As unprecedented attacks on immigrants and asylum seekers intensify, CGRS's work is more critical than ever. We are committed to challenging the unlawful policies that violate the rights of those fleeing persecution, and to advocating for a just and peaceful world where people do not need to flee their home countries in order to save their lives.



Karen Musalo

PROFESSOR KAREN MUSALO
DIRECTOR

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SAFEGUARDING THE RIGHT TO ASYLUM

Since the reelection of Donald Trump, protections for refugees and asylum seekers have been under existential threat. All refugee admissions have been suspended, with the exception of the admission of a number of white South Africans, and those fleeing persecution are prohibited from raising asylum claims when they arrive at the U.S. border. CGRS is taking a leading role in challenging these unjust and inhumane policies.

CGRS engages in impact litigation to challenge systemic barriers to asylum as well as intervenes as counsel or *amicus* in select individual asylum cases to set positive precedent. Since Trump took office for his second term, we have filed three separate lawsuits to halt policies that deny asylum protections and prevent individuals and families from accessing asylum at the U.S. border. In April, we secured a victory in *Immigrant Defenders Law Center v. Noem*, blocking the government's reimplementation of the "Remain in Mexico" policy, which forced people seeking asylum to await their U.S. immigration court date under perilous conditions in Mexico.

IN THE PAST YEAR:

- We were counsel in **12** major national impact litigation cases.
- We were counsel or *amicus* in **31** individual asylum cases at the Courts of Appeals, the Board of Immigration Appeals (BIA), immigration courts and United States Citizenship and Immigration Services (USCIS).
- We filed an *amicus* brief with the Supreme Court in *Department of Homeland Security v. D.V.D.* arguing against the removal of asylum seekers to places like South Sudan, Libya, and El Salvador where they face a substantial risk of torture or other ill-treatment without adequate notice and a meaningful opportunity to express their fears.
- We filed an urgent request with Inter-American Commission on Human Rights demanding immediate action against El Salvador for the unlawful detention of at least 288 individuals, many with pending asylum claims, transferred from the United States to the CECOT mega-prison in March 2025 by the Trump administration without any legal process. To complement U.S. litigation efforts, this request aims to ensure access to asylum and a fair legal process.

CHAMPIONING FAIR AND HUMANE POLICIES

CGRS takes a leading role in national coalitions, submitting in-depth comments on immigration-related rulemaking and providing guidance for organizations and individuals submitting comments to proposed regulations. CGRS also co-leads the #WelcomeWithDignity campaign for asylum rights, empowering impacted communities nationwide to build collective resistance and momentum against regressive measures.

Over the last year, we published **35** policy resources, including factsheets and rapid response materials, to help inform and guide advocates and policy makers. We also produced select resources in Spanish.

CGRS IN THE NEWS

Journalists frequently turn to CGRS staff for our expertise and insight on the latest developments in immigration and asylum law and policy. This year, we were quoted, featured, or used as a source in **160** media pieces in national and international press. CGRS faculty published **8** op-eds and other commentary, including in the *Los Angeles Times* and *Just Security*.

RESPONDING TO THE CLIMATE EMERGENCY



CGRS is a leader in the movement to expand access to protection for those displaced by the impacts of climate change. We develop practical guidance and country conditions documentation to support advocates representing climate-displaced individuals.

Building on our 2023 climate practice advisory, we co-authored a groundbreaking new resource for global partners, *International Protection for People Displaced Across Borders in the Context of Climate Change and Disasters: A Practical Toolkit*, to help legal practitioners and decision-makers navigate protection claims involving climate factors. With the Kaldor Centre for International Refugee Law and University of Essex School of Law and Human Rights Centre, and support from the United Nations High Commissioner for Refugees (UNHCR), we launched multiple worldwide briefings and webinars on the Practical Toolkit and international protection frameworks.

This year we participated in the 40th Anniversary of the 1984 Cartagena Declaration on Refugees, a regional protection agreement. The commemoration provided an opportunity for states and stakeholders to discuss ongoing challenges and new commitments in response to displacement in Latin America and the Caribbean. As part of this process, we submitted recommendations and coordinated a webinar to assess emerging trends and regional approaches. When the process culminated in the Chile Declaration and Plan of Action (2024–2034), we analyzed its potential as a blueprint for addressing climate- and disaster-related displacement in the Americas.



UNPARALLELED ASYLUM LAW EXPERTISE

CGRS is a nationally recognized leader in the field of asylum law, supporting thousands of attorneys annually with the online tools and training they need to successfully litigate asylum cases. We are recognized by the State Bar of California as a primary technical assistance (TA) and training provider for a state-wide network of legal services organizations. In this current climate, we are developing rapid-response resources and trainings to ensure advocates remain informed about policy changes that directly impact their clients.

In 2024-2025 we:

- Provided tailored consultation and technical assistance in more than **8,000** individual asylum cases.
- Conducted over **100** webinars, workshops, and other presentations, reaching an additional **9,000** advocates nationwide.
- Produced and disseminated **49** new CGRS-authored resources, including in-depth practice advisories, country-conditions evidentiary materials, and model briefing.
- Continued to provide attorneys with free, one-of-a-kind access to experts to support their asylum cases through our online expert witness database, which now includes **500** country conditions experts and medical professionals



How our TA Program works

SHINING A LIGHT ON ASYLUM ADJUDICATION

This year, CGRS added a new Immigration Judge (IJ) Dashboard to our innovative online tools. Drawing from CGRS's repository of over **15,500** unpublished immigration decisions, the dashboard offers detailed insights into how specific judges have ruled on asylum cases involving similar fact patterns. This unprecedented level of transparency enables advocates to tailor litigation strategies based on real trends, data which is otherwise not available to the public. CGRS staff published an article in Bender's Immigration Bulletin outlining the importance of the IJ dashboard in understanding how extrajudicial factors and bias influence immigration judges.

CGRS Director, Professor Karen Musalo, along with co-authors, provided a deeper analysis of immigration judge decision-making in her article, *With Fear, Favor, and Flawed Analysis: Decision-Making in U.S. Immigration Courts*, in Boston College Law Review. The article identified the way various biases impact the outcomes in asylum cases.

REGIONAL APPROACH TO MIGRATION

CGRS aims to ensure that U.S. policies prioritize human rights and access to meaningful protection. We work with partner organizations in the United States, Latin America, and the Caribbean to advocate for humane migration policies, address the root causes of forced migration, and contribute to the development of a more just regional system of refugee protection.

This year, in collaboration between the Refugee and Human Rights Clinic and CGRS, Professor Karen Musalo carried out a third fact-finding trip to Honduras to document human rights abuses and displacement caused by climate change and environmental degradation. These trips provide us with the opportunity to work with regional partners to develop country conditions evidence, including expert witness declarations which constitute critical proof in asylum claims.



CGRS and Refugee and Human Rights Clinic fact-finding delegation to Honduras March 2025

HAITI JUSTICE PARTNERSHIP: 2025 DELEGATION TO MEXICO CITY

In March, CGRS Legal Director and Visiting Assistant Professor Blaine Bookey led a delegation of CGRS staff, UC Law SF Haiti Justice Partnership faculty and students, and other partners including a professor from our sister law school in Haiti, *l'École Supérieure Catholique de Droit de Jérémie* (ESCDROJ), to Mexico City to document current conditions facing Haitian asylum seekers and provide Know Your Rights (KYRs) trainings in Haitian Creole.

The delegation interviewed dozens of migrants, met with NGOs, UNHCR and Mexico City government officials, and conducted KYRs for Haitian migrants. In coordination with local partners, the delegation surveyed the pressing needs of Haitian and other non-Spanish-speaking asylum seekers in Mexico City.



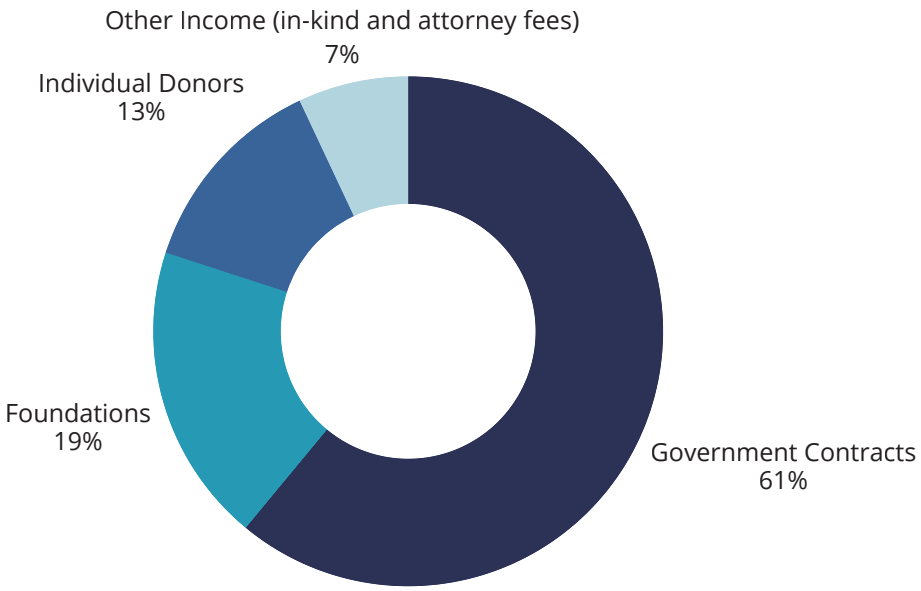
CGRS and Haiti Justice Partnership delegation to Mexico City March 2025

The delegation incorporated its findings into a shadow report for the UN Human Rights Council's review of the United States, which documents how U.S. policies that deny migrants the right to seek asylum violate international law, and have a disproportionate impact on Haitian and other Black asylum seekers forced to stay in Mexico.

FISCAL YEAR 2025 FINANCIAL OVERVIEW

Center Operating Budget: $4,052,852

SOURCES OF REVENUE



Special thanks to: Dean and Chancellor, David Faigman, and the Academic Dean, Morris Ratner, our Advisory Board, and our individual donors who make our work possible.

INSTAGRAM - @CGRSASYLUM

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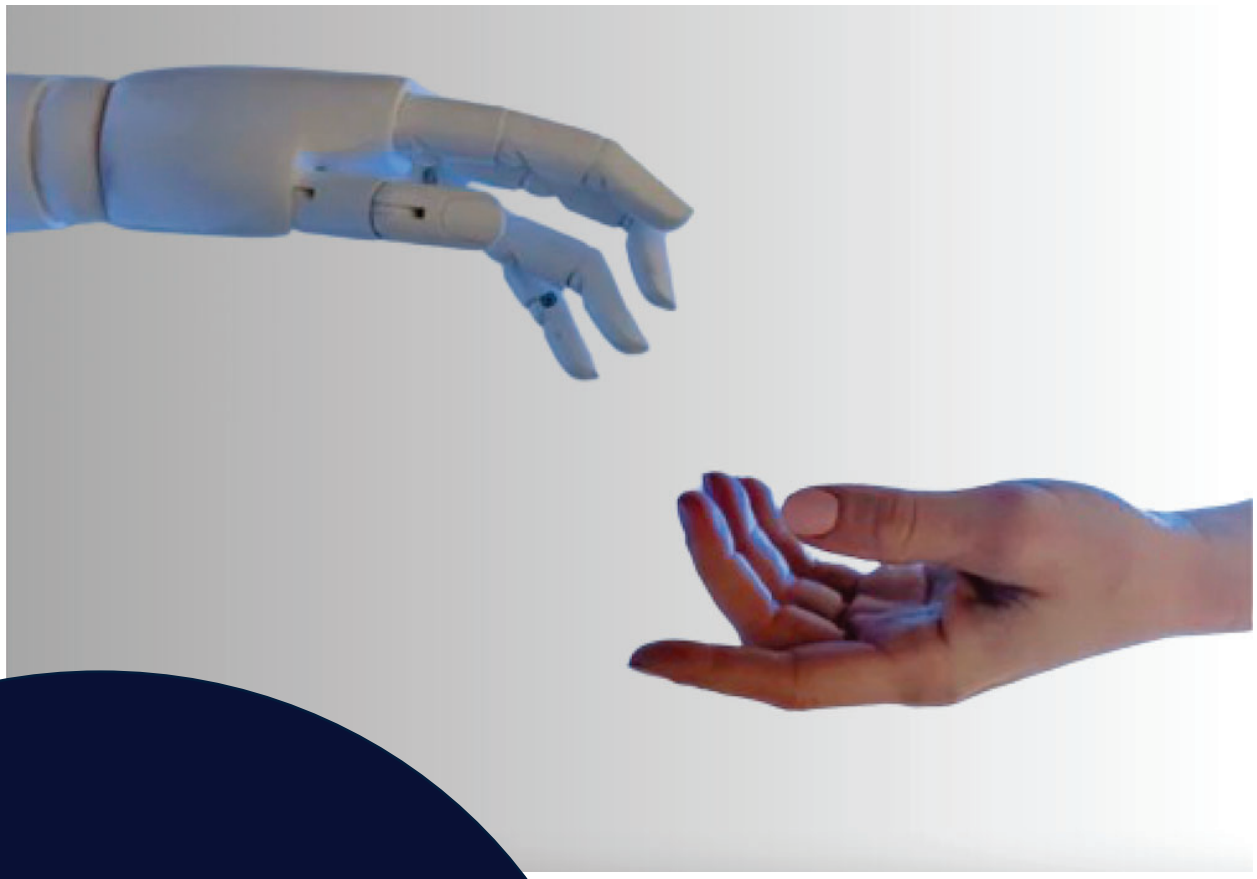
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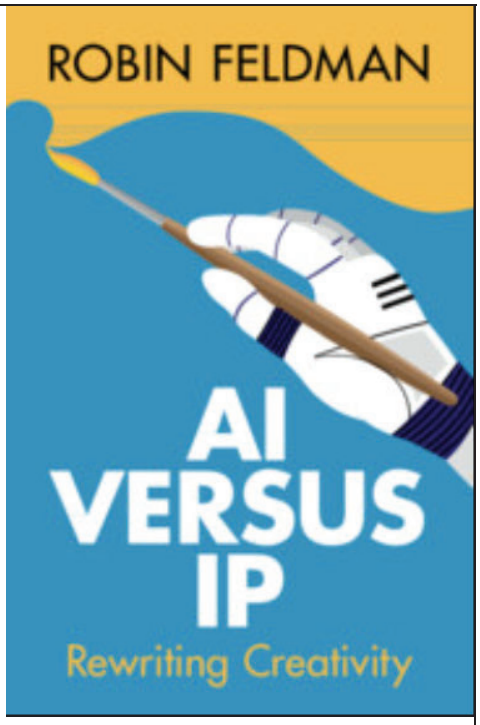
ANNUAL REPORT
2024 – 2025

CENTER FOR INNOVATION (C4i)



C4I DIRECTOR
PROFESSOR
ROBIN FELDMAN

MESSAGE FROM THE DIRECTOR ROBIN FELDMAN



This year brought many exciting developments, especially for the **AI Law & Innovation Institute,** the newest branch of **C4i**. The Institute's purpose is to anticipate the research needed to answer the policy issues of today and tomorrow.

In addition to publishing five academic articles in journals and completing eight others, C4i shifted into high gear to support publication of my 5th book, ***AI & IP: Rewriting Creativity*** (forthcoming Summer 2025). The work also yielded dividends with an on-campus podcast filming entitled, **"How I Used AI in Writing a Book on AI".**

C4i's flagship program, **Startup Legal Garage,** provides students with hands-on legal experience and startups with free legal advice. In its **Spring 2024 lineup,** we partnered with **17 startups**. To date, **more than 600 students** have been launched into the world of startup law, serving **over 550 startups.** An astonishing **80%** of these startups are still in business today; **14** others have achieved buyout by a larger firm. Program alumni have exited for millions of dollars, received funding from the NIH, and won the Nobel Prize.

C4i's research through the **Law and Medicine Initiative** also met with significant success this year, with publications appearing in *Berkeley Technology Law Journal, Vanderbilt Ent. & Tech. L., University of Illinois Law,* and more.

As in recent years, we responded to dozens of requests for technical advice or testimony from Congressional committees and regulatory agencies, including the Senate Health Committee, the Department of Justice's working group on AI, and the California Law Revision Commission's hearings on healthcare and on AI.



Finally, in a year of scarce resources, we were honored to receive $2.5 million in grants and gifts. We will do our best to live up to that trust and to continue advancing the reputation of UC Law SF.

-Professor Robin Feldman

CENTER FOR INNOVATION MISSION STATEMENT

Connect with C4i:

Website: www.uclawsf.edu/center-for-innovation/
Email: feldmanr@uclawsf.edu
Twitter: @C4iUCLaw
Donate:

"More than a think tank, C4i is an action tank invested in **identifying implementable solutions to today's problems.**"

Research initiatives and classroom components are integral to the Center as it identifies and advances the knowledge, tools, and skills necessary to foster innovation in the practice and development of law and policy, and in legal education."

The Center for Innovation (C4i) at UC Law features three dynamic initiatives: the Startup Legal Garage; the Law & Medicine Initiative; and the AI Law & Innovation Institute

- **Startup Legal Garage** provides startups with free legal advice and UC Law students with hands-on legal experience while supervised by attorneys from the area's leading law firms, creating win-win-win experiences for all participants.
- The **Law & Medicine Initiative** empowers policymakers, stakeholders, and regulators to make informed, evidence-based decisions at the intersection of intellectual property law and medicine.
- **The AI Law & Innovation Institute** anticipates the research needed to answer the innovation policy issues of today and tomorrow, so we can help solve those issues as they arrive.

Center Leadership



Robin Feldman
C4i Director



Paul Belonick
SLG Director
C4i Assistant Director



Gideon Schor
Law & Medicine Director



Zac Henderson
Shashi & DJ Deb Professor of Emerging Technology and Law

AI LAW & INNOVATION INSTITUTE
KEY WORK



Government Activities Related to AI

For almost a decade, Professor Feldman and C4i have provided guidance on AI to government institutions upon request:

- Technical advice to **congressional committees and agencies** on regulation of AI
- The **Army Cyber Institute's** threat casting exercise on Weaponization of Data
- The **GAO's** Artificial Intelligence Roundtable report to Congress on the future of AI
- The **United Nations** (address delivered to the 2023 General Assembly Science Summit on the impact of AI, delivered by Chancellor David Faigman)
- The **Federal Trade Commission's** hearing on Emerging Competition, Innovation, and Market Structure Questions Around Algorithms, AI, and Predictive Analytics
- The **US Patent & Trademark Office's** Listening Session on Patents and AI Inventorship
- The **National Academies'** Workshop on AI and Machine Learning to Accelerate Translational Research, for the Government-University-Industry Research Roundtable
- The **National Academies'** Workshop on Robotics and AI
- The **Department of Justice's** working group on AI

Academic Work on Artificial Intelligence

(For past publications, see **https://www.uclawsf.edu/people/robin-feldman/**)

- ***AI & IP: Rewriting Creativity***
  Forthcoming, CAMBRIDGE UNIVERSITY PRESS, Robin Feldman
- ***Artificial Intelligence and Cracks in the Foundation of Intellectual Property***
  UC LAW JOURNAL, Robin Feldman
- ***AI and Antitrust: "The Algorithm Made Me Do It"***
  COMPETITION, Robin Feldman and Caroline Yuen
- ***AI & Probabilistic Dispute Resolution***
  WISCONSIN LAW REVIEW, Zac Henderson

STARTUP LEGAL GARAGE PROGRAM HIGHLIGHTS

Connect with SLG:

Website: www.startuplegalgarage.org
Email: startuplegalgarage@uclawsf.edu
Twitter: @UCstartupgarage
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As the flagship program of C4i, the **Startup Legal Garage** provides free legal services for early-stage technology and biotechnology startups through partnerships with incubators and law firms. In particular, the program supports women- and minority-owned businesses. In past years, Startup Legal Garage has won awards from both the **American Legal Technology Awards** and **Bloomberg's Law School Innovation Program.**

Highlights from our 2024 - 2025 Lineup:

- **Aquamesh**, using IoT networks to enable **remote water quality monitoring.**
- **Episense,** monitoring brain activity to **predict incoming seizures**.
- **Hakimu Group,** using AI to help **build legal infrastructure across Africa.**
- **Wizearly**, using AI to help **identify students at risk of chronic absenteeism.**
- **Playrportal**, providing tools to **match female soccer players with professional clubs**.

Past Success Stories Include:

- **Caribou Biosciences:** pioneered CRISPR technology; founded with the help of our law students. Founder Jennifer Doudna was awarded the Nobel Prize in Chemistry in 2020.
- **Black Girls Code:** seeking to increase the number of women of color in the digital space by empowering girls of color ages 7 to 17 to become innovators in STEM fields, leaders in their communities, and builders of their own futures through exposure to computer science and technology. Recognized by PC Magazine, NY Daily News, The Independent, CNET, Fortune, Newsweek, CNBC, Huffington Post, NPR, and USA Today.
- **Evolve Energy:** helping consumers save their energy costs through AI and IOT.

LAW & MEDICINE INITIATIVE
FEATURED RESEARCH 2024 – 2025

Dance of the Biologics
(*BERKELEY TECHNOLOGY LAW JOURNAL)*

The system set forth by the Biosimilars Act is so complex that scholarship has largely avoided explaining it. This article tackles every step of the process head-on.

Purple is the New Orange
(UNIVERSITY OF ILLINOIS LAW REVIEW)

The Purple Book does not provide nearly as much intellectual property information as the Orange Book. Insulin is a case study in the Purple Book's informational shortcomings.

The New Clinical Investigation Exclusivity: A Substantial Source of Monopoly Time for Brand Drugs
(NATURE BIOTECHNOLOGY)

In the United States, some non-patent exclusivities can have an outsized impact on the ability of generic competitors to enter the market and lower drug prices.

AI and Antitrust: "The Algorithm Made Me Do It"
(COMPETITION)

As AI becomes a more accurate tool, it could lead to anticompetitive hub-and-spokes arrangements that current competition laws may not be fully equipped to evaluate. Using the pharmaceutical supply chain as an example of an industry with concentrated intermediaries, this article identifies such structures as tacit collusion. AI is likely to exacerbate the issue.

NIH Licensing Would Benefit from Free-Market Provisions. Cambridge's Journal of Law, Medicine & Ethics
(Cambridge's JOURNAL OF LAW, MEDICINE & ETHICS)

Government encouragement of free markets is an effective way to foster pharmaceutical innovation; by including "free-market provisions" in its licensing agreements that discourage anti-competitive/research-impeding behavior, the NIH can support this goal without new legislation.

C4i also completed seven studies this year which are under review at journals. Stay tuned!

Center for Litigation and Courts at UC Law – SF

2024-2025

CLC ANNUAL REPORT



CLC Founding Director
Professor Scott Dodson

MESSAGE FROM THE FACULTY DIRECTOR

Scott Dodson



No other academic center in the world has the broad mandate of studying civil litigation and the courts. The Center for Litigation and Courts at UC Law has that mandate.

Founded in spring 2021, CLC has become a global leader in bringing academic discussion, knowledge, and guidance to civil litigation:

- Hosts, in partnership with key organizations like NITA and the National Judicial College, educational and skill-building events for the bench and bar;
- Organizes and cosponsors an annual academic conference on the cutting-edge topic of complex litigation ethics;
- Produces original scholarship on litigation and courts and submits amicus briefs to courts across the nation;
- Publishes The Judges' Book annually and disseminates it free to all federal judges nationwide and all California state judges;
- Holds moot courts for attorneys appearing before appellate courts around the country, and is currently slated to moot around 70% of the California Supreme Court's civil cases in 2025;
- Houses the nationally ranked UC Law SF Trial Team and is the focal point for the Concentration in Civil Litigation and ADR.

SELECT HIGHLIGHTS in 2024-2025

New Scholarship

"The Complexities of Consent to Personal Jurisdiction" *California Law Review* (2025)

This article showcases the complexities of the new consent-to-personal-jurisdiction doctrine after Mallory v. Norfolk Southern Railway Co..

"Cy Pres in Federal Securities Class Actions" *Emory Law Journal* (2024)

This article empirically validates some concerns about cy pres distributions, including lax oversight by courts, conflicts with recipients, and the selection of recipients unlikely to advance the class's interests.

2025 National Civil Justice Institute Appellate Advocacy Award

CLC Director Scott Dodson and CLC Research Professor Joshua Davis won the National Civil Justice Institute's 2025 Appellate Advocacy Award for their pro bono representation of Stuart Harrow before the United States Supreme Court. Harrow, a longtime federal employee, challenged a furlough but was told by the Federal Circuit that he missed a filing deadline in his case and that, because the deadline was jurisdictional, the court could not excuse his lateness. Dodson and Davis successfully sought certiorari on the jurisdictional issue. Dodson wrote the briefs, and Davis argued the case. They prevailed, securing a 9-0 reversal of the Federal Circuit. In addition to keeping Harrow's case alive, the win provided greater access to justice for the many pro se MSPB complainants seeking judicial review.

Special Thanks To:

Chancellor and Dean David Faigman
Provost and Academic Dean Morris Ratner
CLC Staff and Affiliates
CLC Advisory Board
Huntington National Bank

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2024-25

ANNUAL REPORT



Center for Negotiation & Dispute Resolution
UC Law San Francisco

UC Law SAN FRANCISCO

MESSAGE FROM THE DIRECTOR



Professor of Law & Faculty Director
Hiro N. Aragaki

Established in 2003, the Center for Negotiation and Dispute Resolution (CNDR) at UC Law San Francisco is **one of the oldest** law school alternative dispute resolution (ADR) centers in the country. It is a premier **ADR think tank** that brings cutting edge research to bear on the latest developments in practice faced by lawyers, neutrals, governmental actors, NGOs, and parties seeking to resolve their disputes out of court. CNDR is also an **award-winning training institute** that offers hands-on, practice-ready education to law students in small classes of twenty or fewer. Hundreds of lawyers, judges, and policy makers from across the globe have also chosen CNDR as their go-to provider for ADR training, citing its world-renowned faculty and broad offerings in negotiation, mediation, arbitration, and more.

We welcome the opportunity to work with those who share our dedication to resolving conflict outside of the traditional litigation system and hope you will consider joining in our efforts.

OUR MISSION

Litigation is not the only or best way to resolve the vast majority of disputes; a modern system of justice needs quality **litigation alternatives**. CNDR's mission is to help scholars and their students think big ideas about those alternatives, and to provide a forum to engage ADR practitioners, policy makers, and government actors working in the trenches. It does so in a number of ways:

01.

Undertaking rigorous **scholarship** that has real-world impact.

02.

Developing new courses and **teaching** methods that emphasize learning by doing and practice-readiness.

03.

Ensuring that our work has both a **local and a global reach**, adhering to the highest values of diversity, equity, and inclusion.

"[UC Law SF] has rapidly become an academic leader in the alternative dispute resolution field. The knowledge and opportunities for experience available to its students are exceptional."

-**Dorothy W. Nelson**, Senior Judge, Ninth Circuit U.S. Court of Appeals

OUR TEAM

CORE FACULTY & STAFF



Hiro N. Aragaki
Professor of Law &
Faculty Director



Clark Freshman
Professor of Law



Gail Silverstein
Associate Dean for
Experiential Learning,



Corey Linehan
Associate Director



Karen Grayson
Senior Academic
Program Coordinator



Clint Waasted
Director, Negotiation
and Dispute
Resolution Team

AFFILIATED FACULTY



Jo Carrillo
Professor of Law



Thalia González
Professor of Law and Harry & Lillian Hastings Research Chair



Betsy Candler
Professor of Practice



Mattie Robertson
Professor of Practice



Dwight Golann
Research Professor



Catherine Rogers
Research Professor & Professor, Bocconi University Milan, Italy



Simon Boehme
Senior Fellow



Zach Henderson
Visiting Assistant Professor

"UC Law SF is a beacon for ADR in the San Francisco Bay Area and beyond."

-Serena K. Lee, President & CEO, International Institute for Conflict Prevention & Resolution (CPR)

INNOVATIVE TEACHING

CNDR helped pioneer skills-based and clinical ADR education in law schools. Approximately **25%** of all JD students take at least one of our courses, and we expect demand to increase over time given the ABA's new requirements for experiential learning units, and with negotiation and dispute resolution being tested on the **NextGen Bar Exam** starting in 2026. CNDR also helps oversee the *Civil Litigation & ADR Concentration* for JD students and the *Dispute Resolution & Legal Process* specialization for LLM students.



Our adjunct professors are thought leaders in the ADR field and include **Howard Herman,** former Director of the ADR Program at the U.S. District Court, San Francisco) and **Colin Rule**, the CEO of mediate.com and architect of ODR systems at eBay and PayPal.

"CNDR has the most interesting and vibrant ADR teachers and state-of-the-art courses for law students in the Bay Area."

-**Gary Friedman**, Co-founder, Center for Understanding in Conflict

INTERNATIONAL IMPACT

In September 2024, CNDR held an international training on dispute systems design and mediation reform for a distinguished group of international visitors, including Supreme Court justices, judges, lawyers, and mediators from every continent except Antarctica.



CNDR is helping the next generation of lawyers in India--a country of 1.3 billion people--learn about mediation.

In 2020, the Bar Council of India required every law school to offer a compulsory ADR course. CNDR is partnering with the **top law school** in India, the National Law School in Bangalore, to help develop a negotiation and mediation advocacy course adapted to the Indian context that can also be used as a model by other law schools.

PROFESSIONAL TRAININGS

Mastering the Fundamentals of Mediation Certificate Training

In July 2024, CNDR offered this highly sought-after, annual 40-hour comprehensive mediation training for practitioners

Customized Mediation Training for the California Labor Commissioner's Office

In 2024-25, CNDR provided a series of mediation certification trainings to approximately 225 administrative law judges and investigators at the California Department of Industrial Relations, one of the largest CNDR trainings in recent years.

"CNDR has been an invaluable partner in building our Alternative Dispute Resolution Program and helping us serve the public better."

-**Karen V. Clopton**, Chief Administrative Law Judge, California Public Utilities Commission

"Fantastic! [Mastering the Fundamentals of Mediation] blew away my expectations."

– Trainee from 2022

In 2024-05, CNDR provided specialized training programs for several bay Area corporations, including **Block, The Meta Oversight Board**, and **Exelixis**.

EVENTS & PROGRAMS

ADR Speaker Series: January-March 2025



The Dynamics of Infrastructure Dispute Mitigation
Shahla Ali, Professor of Law, Associate Dean (International) and Director of the LLM Program in Arbitration and Dispute Resolution at the University of Hong Kong, Faculty of Law



Dealing with International Dispute Resolution; Multiple Parties and Wicked Problems
Carrie Menkel-Meadow, Chancellor's Professor of Law and Political Science, University of California, Irvine and A.B. Chettle Jr. Professor of Law, Dispute Resolution and Civil Procedure, Emerita, Georgetown University



Settlementality
Jesse Bregant, Assistant Professor, University of Houston Law Center



The Psychology of Lawyers in Litigation and Negotiation
Jean Sternlight, Saltman Professor of Law & Founding Director Saltman Center for Conflict Resolution, William S. Boyd School of Law, University of Nevada, Las Vegas



How Can Real Practice System Theory Help Attorneys and Mediators Improve Their Performance?
John M. Lande, Isidor Loeb Professor Emeritus at the University of Missouri School of Law



Joint Session or Caucus? Factors Related to How the Initial Mediation Session Begins
Art Hinshaw, Associate Dean for Experiential Learning, Faculty Director, Lodestar Dispute Resolution Center, Clinical Professor of Law, Sandra Day O'Connor College of Law at Arizona State University

STUDENT ENGAGEMENT

With an experienced Silicon Valley negotiator as its coach, the UC Law SF **Negotiation & Dispute Resolution Team** has consistently received top accolades at student moot court competitions hosted by the ABA, the International Chamber of Commerce in Paris, and others.



Scholarships

The Francis E. McGovern scholarship was created to honor the legendary UC Law SF Professor and renowned court-appointed special master. The scholarship supports a continuing UC Law SF student who has engaged in ADR in an exceptional capacity during their time at the law school. This year's McGovern Scholarship was awarded to **Ron Kinan**, JD '26

SPECIAL THANKS

Chancellor and Dean David Faigman
Provost and Academic Dean Morris Ratner

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2024-2025

RICE ANNUAL REPORT



UC LAW SAN FRANCISCO
CENTER FOR RACE, IMMIGRATION, CITIZENSHIP & EQUALITY

Faculty-Director of RICE
Professor Ming H[illegible]hen

Message from Faculty Director Ming Hsu Chen

Dear friends and supporters of RICE,



Challenging times require community solidarity. RICE reaffirmed the core principles of equality in race, immigration, and citizenship in partnership with UC Law community: immigration kickoff event (with Students for Immigrants Rights), Racial Capitalism Symposium (with CREJ), Angel Island historical tour and panel on Cosmopolitanism and Nationalism (with AALS Immigration Section), and a white paper on civic engagement of New Americans (in partnership with NAC). As we transition to private funding, your support for academic research on law and policies, pro bono service projects, public education and community events is more important than ever! Thank you to Morris Ratner, Cynthia Diaz, Leslie Hernandez, Ashley Judilla; Larry Drumm, Ken & Gina Hsu, Reuel Schiller, Don Tamaki, and UC Law SF students Emily Cole, Adrian Ballesteros, Saamia Aziz, Ju Lee for their support.



RICE Advisory Board



Irene Bloemraad
UC Berkeley, Centre for Migration Studies and Political Science, University of British Columbia



Catherine Seitz
Immigration Institute of the Bay Area, Legal Director (UC Law '01)



Hiroshi Motomura
UCLA Law School and Center for Immigration Law and Policy



Gabriel 'Jack' Chin
UC Davis School of Law, Aoiki Center, and Global Migration Center



Lucia Martel Dow
Immigrant Legal Resource Center, New Americans Camoaign (UC Law '12)



Jack Trasviña
Commissioner, SF Board of Appeals; Former Dean, USF Law School

Faculty-Affiliates



Alina Ball



Blaine Bookey



Richard Boswell



Matt Coles



Thalia Gonzáles



Rory Little



Karen Musalo



Brittany Glidden



Ascanio Piomelli



Reuel Schiller

RICE Kick off Panel

September 25, 2024

Professors Ming Hsu Chen, Richard Boswell, Karen Musalo and Students for Immigrants Rights held a luncheon to expose students to the wealth of UC Law classes, clinics, externships, pro bono naturalization workshops, and spring break service trips to Haiti and the US-Mexico border on immigration, asylum, and citizenship.





AALS Immigration Reception and Angel Island Trip

January 9-11, 2025



On January 9, RICE hosted the AALS Immigration Section reception at the Asian Art Museum, just across the street from UC Law SF, where students mingled with nationally-prominent immigration scholars. On January 11, they toured Angel Island immigration barracks and new museum with the Angel Island Station Foundation to learn about the 300,000 detainees held there during the Chinese Exclusion Era.

Racial Capitalism Symposium

February 7, 2025

RICE and CREJ co-hosted an all day symposium on Racial Capitalism. Professor Ming Hsu Chen discussed her research on racialization of Silicon Valley technology workers, from Google to Uber ,with Professor Veena Dubal (UC Irvine School of Law and formerly UC Law SF). Pioneer of critical race theory Cheryl Harris (UCLA Law and UC Law SF Visiting Scholar) delivered the keynote address on landmark Supreme Court cases that uphold and reproduce a racialized economy. Professor Shauna Marshall moderated a discussion with Professor Thalia González (UC Law SF), Professor Angela Harris (Seattle U. School of Law), Professor Tonya Brito (University of Wisconsin Law School), Professor Carmen Gonzalez (Loyola Chicago School of Law), and Renee Hatcher (UI Chicago Law School) on racial capitalism in education, immigration, economics, environment.





RICE Tasting Tour

May 11, 2025



UC Law SF alumnae, faculty, and students embarked on their second annual tasting tour (aka rice crawl) in Chinatown and North Beach. They walked from restaurants to restaurant sampling rice dishes from Chinese, Italian, Nepali, and Middle Eastern cuisines while building community and learning about RICE's work throughout the community of SF.

RICE Scholarship

In 2024, RICE partnered with the New Americans Campaign (Lucia Martel Dow and Leah Muse-Orlinoff to study civic engagement among naturalized citizens. Professor Ming Hsu Chen and UC Law research assistants Adrian Ballesteros, Emily Cole, and Joy Seehee Min, interviewed naturalized citizens from Asian American, Arab American, and Latinx communities to better understand how naturalized citizens view their civic engagement and how the engage in civic society. The report found that naturalized citizens possess a strong sense of civic duty while maintaining close ties to their own culture. The white report will be used to help NAC and other organizations develop policies and practices that facilitates the feeling of welcome and belonging that leads to increased civic participation among citizens.

RICE in the News

We can't ignore Latino and Asian American voices in 2024 - June 13, 2023
Professor Ming Hsu Chen discusses the importance of political representation amongst Latino and Asian American voters.

Undocumented students need jobs to pay for college. Public universities can hire them - July 6, 2023
Professor Ming Hsu Chen writes in favor of hiring programs for Dreamers in public universities.

What the Supreme Court Got Wrong About Affirmative Action - September 6, 2023
Professor Ming Hsu Chen discusses the limitations of relying on racial binaries in contemporary analysis of affirmative action.

We should end legacy admissions. But it won't make up for losing affirmative action. - January 13, 2024
Professor Ming Hsu Chen explores the push to end legacy admissions in response to threats to affirmative action.

California cannot abandon undocumented students after UC regents cave to politics - February 24, 2024
Professor Ming Hsu Chen assesses reactions to UC Regents voting to ban hiring undocumented students.

A 129-Year-Old San Francisco lawsuit Could Stop Trump From Ending Birthright Citizenship - *January 21, 2025*
Professor Ming Hsu Chen discusses birthright citizenship and the Constitution in context of the Trump Administration with KQED.

How a young Chinatown cook helped establish birthright citizenship in the US - January 27, 2025
Professor Ming Hsu Chen discusses Executive order 14160 denying citizenship to people born to undocumented parents and legal precedent surrounding birthright citizenship.

Let the Record Show - March 13, 2025
UC Law San Francisco spotlights the work RICE does to shape debates around birthright citizenship and issues of equality for immigrants.

Upcoming Events 25-26

Social Justice Welcome Reception
Citizenship Day
Symposium: Rule of Law & Threats to Democracy
RICE Tasting Tour

Staff Leslie Hernandez, Ashley Judd, Cynthia Diaz
RICE Research Fellows Saamia Aziz, Emily Cole

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Center for Race, Immigration, Citizenship, and Equality

Center for Race, Immigration, Citizenship, & Equality (RICE)
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CREJ ANNUAL REPORT

2024 - 2025



Mission Statement

The Center for Racial and Economic Justice (CREJ) works to advance equity and justice through legal education, research and scholarship, and academic-community partnerships and collaborations. Through its annual Wiley Manuel Visiting Scholar and Professorship, CREJ hosts leading legal scholars whose work has been recognized as seminal the fields of racial and economic justice.

To achieve its mission, CREJ works collaboratively with UC Law SF faculty, UC Law SF students, and local and national organizations, as well as other race and law centers across the country. A core element of CREJ's leadership at UC Law SF is the contextualization of conventional doctrinal course instruction within a historical and structural context of racism and inequality and course offerings that center critical perspectives of race, identity, and inequity. To address pressing field issues and challenges and facilitate dialogue focused on racial and economic injustice, CREJ convenes scholars, practitioners, and community leaders each year for conferences, symposium, and roundtables.

Faculty Directors



Professor Thalia González



Dean Shauna Marshall



Professor Alina Ball

Dear Community,

As we end another year, the Center for Racial and Economic Justice (CREJ) is thrilled to share its milestones and achievements.

As you will read, our faculty and programs this year have been central in furthering our commitment to racial and economic equity. Whether it was welcoming Professor Cheryl Harris as the Wiley Manuel Visiting Scholar and Professor of Law (p. 5), hosting academics and practitioners from across the country to strategically challenge educational fines and fees (p. 7), engaging in original research in education civil rights (p. 10), partnering with community-based organizations (p. 10) or organizing an all-day symposium on racial capitalism (p. 8), our focus on interrogating systems of oppression and fostering spaces for co-creating justice-led alterative visions has remained steadfast. We are also proud recognize the field accomplishments of CREJ-affiliated faculty members and the two-year appointment of Natalia Ramírez Lee as the C. Keith Wingate Visiting Assistant Professor of Law (p. 6). This year, we have added the reflections of voices within and outside the UC Law community (p. 10) to share how CREJ is working to be a hub for justice.

We extend our heartfelt gratitude to the UC Law staff, student research fellows, panelists, speakers, and attendees whose participation and support have been integral to the success of CREJ programs this year. The dedication and support from those within our UC Law community allows us to continue this vital work. We also wish to thank our community partners and collaborators, your dedication to protecting those most vulnerable across the country inspires us.

In addition to highlighting CREJ's successes this year and thanking all of those engaged with CREJ, we wish to take a special moment and express our deepest and sincere gratitude to founding faculty co-director Professor Alina Ball. She has been instrumental in developing the strong foundations from which CREJ grows and changes. Alina will be deeply missed in the CREJ community, but we are thrilled for this next stage in her academic career and wish her the best as she expands the clinical program at Berkeley Law.

Lastly, the work of racial and economic justice is needed more than ever in this moment of political turmoil. As we looks to the future and expands its work, we humbly ask for your renewed support of and active engagement with CREJ. May the year ahead be filled with hope, access, and dignity for all.

In solidarity,

Professors Thalia González and Shauna Marshall
Faculty Co-Directors
Center for Racial and Economic Justice

Faculty Affiliates



Prithika Balakrishnan



Seema N. Patel



Karen Musalo



Richard Boswell



Veena Dubal



Christine Natoli



Ascanio Piomelli



Matt Coles



Radhika Rao



Reuel Schiller



Ming H. Chen

CREJ Research Fellows



Kaitlin Alcontin

Kaitlin Alcontin is a graduating 3L from Alameda, California who is passionate about the intersections of environmental justice, housing, and labor. She graduated from the UCLA Luskin School in 2022 with a B.A. in Public Affairs and minors in Asian American Studies and Environmental Systems & Society. At UC Law SF, she was Co-Editor in Chief of the UC Law Environmental Journal and a board member for the Pilipinx American Law Society and Students for Disability Rights.

Righteous Caldwell

Righteous Caldwell, originally from Atlanta, Georgia. He attended the University of Pittsburgh and earned a BA in Legal Studies and double minor in Political Science and Economics, with a concentration in Sociology. At UC Law SF, he was the Vice President of the Black Law Student Association and a staff editor for the UC Business Law Journal. His research focuses on education access and the use of fines, fees and charges. He is part of a research team that is coding exclusionary school discipline legislation from the 1900s to present.





Alyssa Scott

Alyssa Scott is a graduating 3L from San Francisco, California who is passionate about criminal justice reform and increasing equitable access to education for all. She graduated from UCLA in 2018 with a B.A. in World Arts and Cultures and a minor in Arts Education. Alyssa was a 2023-24 Co-Chair of UC Law's Abolition & Prisoner Outreach organization and Senior Notes Editor for the UC Law Journal. As a CREJ Research Assistant Alyssa engaged in research on restorative justice, juvenile justice, and education law and policy.

2024-2025

Wiley Manuel Visiting Scholar and Professor

Cheryl I. Harris is the Wiley Manual Visiting Scholar and Professor with CREJ and a leading scholar in Critical Race Theory with over three decades of influential work on racial inequality and the law.



Cheryl Harris

Professor Harris is widely recognized for her scholarship, including her seminal 1993 article "Whiteness as Property," published in the Harvard Law Review. In this piece, she examined how whiteness has historically functioned as a form of property, grounded in the right to exclude. Today, her work remains essential in the study of race, law, and justice.

Professor Harris began her career as an appellate and trial litigator at leading criminal defense firms in Chicago after graduating from Wellesley College and Northwestern School of Law. She went on to serve as a senior legal advisor in Chicago's Office of Legal Counsel. In 1990, she joined the faculty at Chicago-Kent College of Law. The following year, she played a key role in organizing a series of conferences between U.S. legal scholars and South African lawyers during the development of South Africa's first democratic constitution, ratified in 1994. Since then, she has been a part of human rights delegations in several conflict zones included Northern Ireland and Haiti. She joined the UCLA School of Law faculty in 1998, where she co-founded the law school's Critical Race Studies (CRS) Program. In 2021, she was appointed to the City of Los Angeles Reparations Advisory Commission.

Professor Harris' scholarship explores the relationship between law and racial power, with particular focus published in leading law journals such as the Harvard Law Review, California Law Review, and UCLA Law Review. In addition to legal scholarship, her engagement with civil rights history, Black political thought, and critical theory has been featured in several influential interdisciplinary journals and collections.

As a visiting professor, Harris delivered the Mathew O. Tobriner Memorial Lecture and keynote address at CREJ's Racial Capitalism Symposium. This past spring, she taught a seminar on Critical Race Theory. Professor Harris led students through critical inquiries into the persistence of racial inequality in a legal system that formally prohibits discrimination, the role of law both in challenging and maintaining racial hierarchy, and the intersection among forms of inequality.

"Professor Harris is one of the reasons I left civil rights law practice and became a professor," **said Shauna Marshall, CREJ Co-Director.** ***"Her pathbreaking work on race and economic justice inspired a generation of law teachers to think critically and creatively about the way to bring about racial justice in this country. It is truly thrilling to have her a part of CREJ."***

Former CREJ Co-Director Alina Ball echoed this statement.

"Professor Harris is more than a gifted educator—she is a tour de force," **Ball said.** ***"Her passion for teaching and steadfast belief in her students' potential have inspired several of her former students, including myself, to pursue legal academia. She encourages critical thinking, nurtures student growth, and engages each student with compassion and respect for their intellectual contributions."***

2024-2025

C. Keith Wingate Visiting Assistant Professor



Natalia Ramírez Lee

CREJ welcomed Natalia Ramírez Lee as the 2024-2026 C. Keith Wingate Visiting Assistant Professor of Law. Throughout her career, Professor Ramírez Lee has championed workplace equity and supported underrepresented workers in asserting their legal rights.

Previously, Professor Ramírez Lee worked as a litigator for two boutique employment law firms and co-led the Women's Employment Rights Clinic at Golden Gate University School of Law. She graduated from Berkeley Law, where she served as a Managing Editor of the Berkeley Journal of African American Law and Policy (now the Berkeley Journal of Black Law and Policy), Speakers Editor for the Berkeley Journal of Employment and Labor Law, a Coblentz Civil Rights Fellow and was awarded the American Jurisprudence Award in Constitutional Law.

Professor Ramírez Lee's interest in employment law is rooted in the overlap between workplace and racial discrimination. She is particularly interested in exploring issues like caregiver discrimination, which disproportionately affects women workers with family responsibilities. Her areas of scholarship include the intersection of employment law, economic inequality, and racial and gender justice.

***"I want to situate workplace law in a historical context of racism and inequality to give students and fellow scholars a more nuanced understanding of the complexities of racism and other forms of discrimination and subordination in the workplace,"* Professor Ramírez Lee said.**

Last fall, Professor Ramírez Lee co-taught a course on Race, Racism, and the Law. In the spring, Professor Ramírez Lee designed and taught a seminar called *Law, Labor, and Care*, which examined how the legal system addresses—or often fails to address—paid and unpaid care work. The class explored foundational issues in care, including key concepts like the "ideal worker."

Her recent scholarship, including *Flexible Work, Rigid Discrimination*, explores employment discrimination in the context of remote work. The article explains how the legal system is failing to adequately address remote work discrimination, leaving many workers without protection. Another recent article of hers examines how remote work can diminish workers' legal protections due to outdated workplace structures and norms.

Building on her commitment to both scholarship and teaching, Ramírez Lee is energized by the vibrant academic community at UC Law SF.

***"I think it's a dynamic place and that students are doing really interesting work—they're organizing and they're thinking critically about issues going on in our world,"* Professor Ramírez Lee said.**

Overview of Events

“Fine-Free Justice: Lessons From Across the Movements And Advancing Change Now”

On November 1, 2024, students, advocates, legal experts, and community leaders gathered for “Fine-Free Justice: Lessons From Across the Movements and Advancing Change Now,” a symposium dedicated to examining the pervasive and harmful impact of fines and fees across public systems. The event featured two panels and a roundtable working session where attendees explored legal and policy advocacy to reduce and restrict educational fines and fees.

***“My favorite moment of the symposium was the working round table and being able to discuss with students—who these policies effect—ideas on how to educate and protect their communities,”* said Jasmine Richardson-Rushin, Attorney at Youth Law.**

In one of the symposium’s most revealing presentations, Education Law Center Attorney Paige Joki and Professor González shared research identifying 3,846 different ways students can be fined or charged fees in schools, portraying how deeply embedded these financial barriers are.

"The Center for Racial and Economic Justice’s intentional focus on school-based fines and fees is critical,”* Joki said. *“These barriers to access and full participation, which are rooted in racism and economic injustice, demand our urgent attention. Public school children deserve fully funded and truly free schools”

The “Fine Free Schools Movement” panel focused on the growing national campaign to eliminate school-based fines and fees. Drawing on advocacy efforts in Pennsylvania and Missouri, panelists discussed how financial penalties tied to school attendance, truancy, and disciplinary issues disproportionately burden low-income students and families.



Overview of Events

Racial Capitalism Symposium

On February 7, 2024, CREJ hosted the Racial Capitalism Symposium, a powerful, day-long event examining how racial capitalism shapes legal structures, global economies, and lived experiences. The symposium brought together leading scholars and advocates to explore both theoretical and practical applications of racial capitalism and the law. At the symposium, Professor Cheryl I. Harris delivered the Matthew O. Tobriner Lecture, tracing the deep ties between racial injustice, economic inequality, and legal structures.

***"The presentations were enlightening and inspiring and will undoubtedly generate a new wave of legal scholarship on the ways that capitalism and racism are inextricably intertwined both historically and currently,"* said Carmen Gonzalez, Loyola University Chicago School of Law.**

Another highlight was a conversation between UC Law SF Professor Ming Hsu Chen, director of the Center for Race, Immigration, Citizenship and Equality (RICE), and Professor Veena Dubal of UC Irvine Law. Dubal discussed how globalization and tech-sector deregulation have led to a "fissured workplace," where outsourcing suppresses wages and worker protections.

In another panel moderated by CREJ Co-Director Shauna Marshall, scholars explored the global dimensions of racial capitalism, focusing on climate change, migration, education, and resistance strategies.



Panelists highlighted the importance of integrating such topics into legal education and examined how political changes following the 2024 election have impacted protectionism and global economic dynamics. A special focus on Silicon Valley served as a case study in how racial capitalism operates at the intersection of tech, labor, and law.

***"Getting to hear about progress being made within various fields was inspirational in a moment where progress feels stunted and fragile,"* said Amirah Tulloch, class of 2027.**



"The racial capitalism symposium was an incredible event! It was the perfect size and format for not only learning from some of the most distinguished scholars in the field in a plenary format, but also for getting to know more junior scholars and scholars from outside the United States in a small, conversational format. It was well designed for learning [and] I was delighted to be a part of it."

- Angela Harris, Distinguished Professor of Law at Seattle University School of Law

Overview of Events

Mathew O. Tobriner Memorial Lecture

Professor Cheryl Harris delivered the Mathew O. Tobriner Memorial Lecture to a packed auditorium at CREJ's Racial Capitalism Symposium. Her speech, "On Race, Capitalism, and (Im)possible Futures," traced the legal construction of whiteness as property and examined how U.S. law has protected racial hierarchies for centuries. Harris compared today's political turmoil to Gramsci's "interregnum," a period of collapse without clear renewal, marked by "morbid symptoms," and critiqued the two-party system as inadequate to address deep inequalities and warned of rising autocratic threats. Still, she ended with hope, invoking Fannie Lou Hamer's fight for justice.



Student attendee Amirah Tulloch, class of 2027, called the keynote deeply impactful.

"It is always a special moment to hear Professor Harris speak,"* Tulloch said. *"The deftness with which she weaves narrative into her teachings, and her deep understanding of race making and dynamics in the current legal field unlocked a deep and personal anecdote about her travels and experience with racial capitalism in a way that felt so tangible."

Legal and Policy Perspectives on Domestic Employment Symposium

On May 13, 2025, CREJ convened a symposium focused on the legal and structural challenges of domestic employment and labor justice. Centering the experience of domestic employers and workers, the event challenged attendees to critically engage with the intersection of labor law, racial justice, and economic equity. The event also recognized the 15th anniversary of Hand in Hand, a nonprofit organization dedicated to advocating for fair labor standards and shaping policy in the domestic work sector.

***"Domestic workers—nannies, house cleaners, home care workers—have long been excluded from foundational labor protections. But importantly, as the symposium made clear, they are not power-less. Through grassroots organizing, legal innovation, and coalition-building, domestic workers are winning rights and reshaping labor law from the ground up. For our students training to become advocates, this was a vital opportunity to learn how law can be a tool for justice when grounded in history, movement strategy, and community partnership—exactly the kind of critical engagement CREJ exists to foster,"* said Seema Patel, Associate Professor of Law, UC Law SF.**

CREJ as a hub

CREJ serves as a vital hub for students, scholars, and community members engaged in the pursuit of equity and justice. CREJ advances justice through community-engaged research, interdisciplinary scholarship, and sustained collaboration with grassroots organizations, academic centers, and legal advocates.

COMMUNITY COLLABORATIONS

"We (at Legal Services of Eastern Missouri) are immensely grateful for the experience to participate in the fine free justice symposium not only because it offered an opportunity for us to connect with passionate and creative-thinking advocates, but it allowed us to continue moving the needle on the work we hope to accomplish on this issue in Missouri."

- Amanda J. Schneider, Legal Services of Eastern Missouri, Inc.

FACULTY SCHOLARSHIP

- Flexible Work, Rigid Discrimination (Natalia Ramírez Lee, 2025)
- Exclusionary School Discipline State Legislative Trend Analysis (Center for Racial and Economic Justice, 2025)
- Mass Surveillance as Racialized Control (Prithika Balakrishnan, 2025)
- With Fear, Favor, and Flawed Analysis: Decision-Making in U.S. Immigration Courts (Karen Musalo, et al., 2024)
- Aligning United States Law with International Norms Would Remove Major Barriers to Protection in Gender Claims (Karen Musalo, 2024)
- Racial Reckoning and the Police-Free Schools Movement (Thalia González & Rebecca Epstein, 2024)
- Reproducing Inequality: Racial Capitalism and the Cost of Public Education (Thalia González & Paige Joki, 2024)
- The Uncertain Future of Restorative Justice: 'Anti-Woke' Legislation, Retrenchment & Politics of Parental Rights (Thalia González & Mara Schiff, 2024)
- Taking the Name Brown in Vain: Separate but Equal, Brown and the Harvard Case (Matt Coles, 2024)

FIELD RESOURCES

- CREJ released the first FAQ on educational fines and fees, including information on state and national protections.
- CREJ published a legislative brief titled *State Legislation Expanding the Scope and Use of Exclusionary School Discipline (ESD).*

Support the Work

Follow Us

CREJ WEBSITE

CREJ at UC Law SF

UC LAW SF CREJ

ANNUAL REPORT

CENTER FOR
SOCIAL
JUSTICE

FIAT JUSTITIA

2024–2025

MISSION STATEMENT

The Center for Social Justice provides strategic leadership of social justice activities at the law school and promotes a strong public interest campus culture. The CSJ's goal is to help all students find meaningful ways to incorporate justice work into their professional identity and future practice.

MESSAGE FROM CO-DIRECTORS PROFS. BRITTANY GLIDDEN & GAIL SILVERSTEIN



As we all know, the legal profession is experiencing profound challenges. The boundaries of the rule of law and the separation of powers between the government branches are being tested. There has been interference with the judiciary, and retaliation against individual lawyers, firms, and non-profits based on who they represent. The meaning and practice of pro bono work has been deeply impacted. Lawyers are daily being called upon to consider what their prioritized values are, and to ask themselves what their values mean for their practice. Many in the legal profession – including faculty and law students – are standing up for the rule of law via demonstrations, petitions, and standing alongside those in our community who are vulnerable at this moment.

Now, more than in decades, it is important for students to identify and rank their own values and figure out how they will act on these as they practice law. Most students who enter law school have a high priority on justice and ensuring that part of their role as a lawyer will be to defend those who are most vulnerable in our society.

At the Center for Social Justice, we seek to help students in identifying and fostering their values as they enter the legal profession. We greet students at orientation and ask them to think about what is important for them, and how they can continue fostering that alongside their studies. We offer meaningful opportunities for students to engage with our community in direct legal work and offer programming that assists students in understanding the avenues by which their values can be put into action. We also foster community in the law school, allowing students to find support in each other for strength and solidarity. We welcome you to join us in supporting the next generation of lawyers by donating, volunteering, or mentoring!

RIBBON CUTTING FOR THE CSJ ON-CAMPUS SPACE

The Center for Social Justice officially opened our doors in October 2024! Located in the lobby of 200 McAllister, the CSJ is one of the first things visitors see when entering campus. The office has been used for student meetings, lunches, and networking events. At the launch party, the CSJ honored alumni with awards for their contributions to and advocacy for social justice.

SOCIAL JUSTICE ALUMNI ACHIEVEMENT AWARDS

ANGELO SANDOVAL '17 **ARNETA ROGERS '15**













2024-25 PROGRAMMING

From orientation to graduation, the CSJ provides opportunities for community, learning through programs and the SJ concentration, and volunteer opportunities in the Tenderloin and beyond.

ORIENTATION

During orientation, the CSJ organized events for 35 incoming students to volunteer with nonprofits in the Tenderloin community.





Over 100 1Ls also attended our Social Justice Welcome to meet and mingle with SJ faculty, staff, and upper division students.

PRO BONO FAIR

In September 2024, the CSJ's Pro Bono Program hosted a fair where students met student leaders and attorney supervisors from around thirty pro bono projects and non-profits. Students could sign up for volunteer opportunities from tax law to prisoner legal services.



SOCIAL JUSTICE SPEAKER SERIES



The CSJ hosted a speaker series in the fall for 1L students to learn from and engage with student leaders and social justice practitioners about how to get involved in public interest and pro bono work inside and outside of the classroom.

RIGHTS & BITES

Every month, in accordance with a monthly practice-area theme, the CSJ invited students to join a faculty member for lunch to discuss their experience in an area of law ranging from immigration law to housing law to environmental law.



SOCIAL JUSTICE CONCENTRATION











2L students can choose to join the Social Justice Lawyering Concentration, which prepares students to make a positive impact on the world by offering a specialized curriculum of public interest courses, including negotiation, clinics or externships, a class on the impact of race in our society and a yearlong seminar. The Concentration connects students who share a calling to become a strong, supportive, enduring community that helps sustain students throughout their time in law school and as practitioners who pursue impactful social justice work.

SOCIAL JUSTICE CELEBRATION

The CSJ and Clinical Programs hosted a Social Justice Celebration on the Friday before graduation to mark the end of the academic year. Over 150 students, administrators, faculty, staff, and families attended to recognize and commemorate the important impacts students have made over the past year and throughout their time at UC Law SF.

SPRING BREAK PRO BONO TRIPS

Our Alternative Spring Break (ASB) program expanded again this year, with 68 students working at 13 different placements, including immigration work both in Mexico and in the US, education policy, criminal defense, housing, trusts and estates, and "clean slate" work.



CONTRA COSTA PUBLIC DEFENDER'S OFFICE

Through the Contra Costa Public Defender's Office, students observed client interviews in county jail, drafted petitions with the Clean Slate Unit in Martinez, and shadowed juvenile court attorneys in Walnut Creek. For the first time through the ASB program, four 2L and 3L law students became Bar certified and appeared on the record for arraignments.

In Redding and at legal clinics across a variety of rural locales, students worked with Legal Services of Northern California to prepare estate, medical, and financial planning documents for low-income clients. The student volunteers were supervised by alum Sarah Fielding, Class of '14.



LEGAL SERVICES OF NORTHERN CALIFORNIA



AL OTRO LADO

In Tijuana, Pro Bono Program Director Simone Lieban Levine worked with binational nonprofit Al Otro Lado to provide Know Your Rights trainings in a series of shelters for migrants and asylum seekers. Students provided intakes in Spanish to locate potential plaintiffs and help migrants access legal, medical, and social services.

ASB TESTIMONIALS

"It reaffirmed that the legal field is the right path for me. Making a meaningful difference in someone's life—helping them retain their freedom or move forward with their life—was incredibly fulfilling. This work is tough, but it's worth it. There's nothing I'd rather do."

-Joshua Johnson, 2L
Contra Costa Public Defender

"This trip is my favorite UC Law SF memory so far."

-Cameron Remington, 1L
Legal Services of Northern California

"[T]he experience reinforced the importance of collaboration when addressing complex social issues, inspiring me to continue seeking similar community-oriented opportunities during my law school journey."

-Alysha Shahrukh, LLM
Alameda County Office of Education

"Even as a first-year student, I was able to make a meaningful contribution, showing that you don't need to wait until graduation to make a difference."

-Patrick Gonzalvo, 1L
Swords to Plowshares



LAND OF LINCOLN LEGAL AID

In East St. Louis, Illinois, students learned about poverty law, racial justice, and the city's history with Land of Lincoln Legal Aid. They then focused on intersectional reproductive justice by drafting declarations for clients seeking to change their name to affirm their gender or return to a maiden name after divorce.

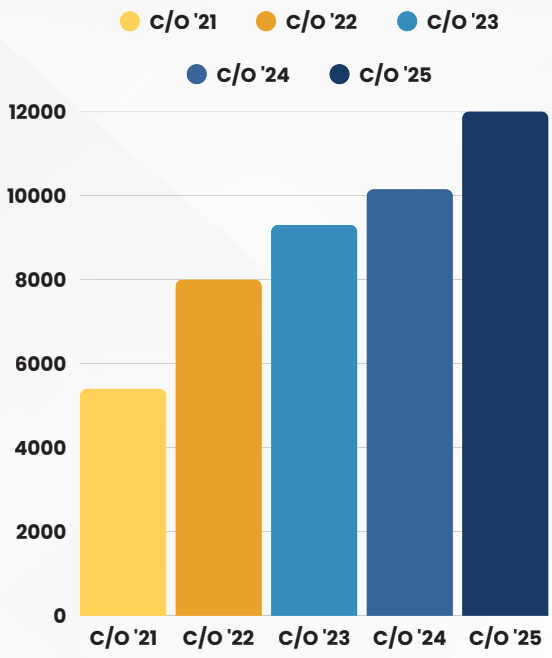


LGBT ASYLUM PROJECT

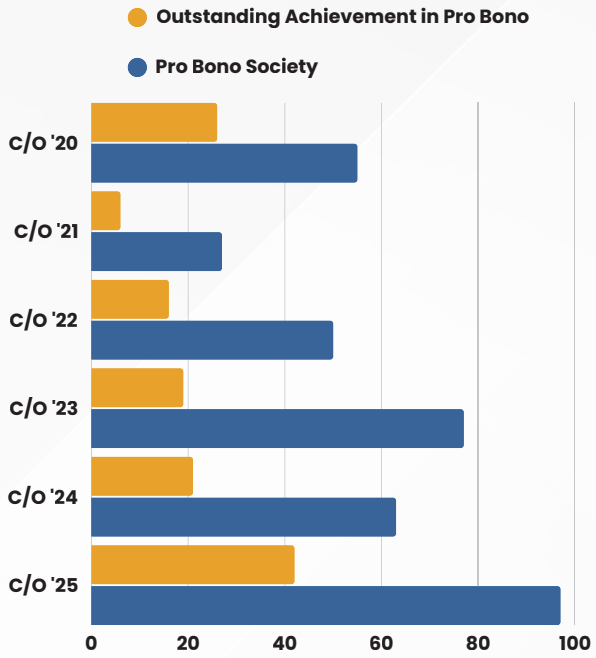
At home in the Bay, students worked with the LGBT Asylum Project to assess case files, edit client declarations, and research and write country condition reports to assist clients fleeing persecution due to their sexual orientation, gender identity, or HIV status.

PRO BONO STATISTICS

CLASS YEAR HOURS



GRADUATION HONORS



Increased percentage of students who submitted hours this academic year compared to when we began tracking in 2020:

71%

CLASS OF 2025 HONORS

97 GRADUATES

became a part of the Pro Bono Society: Volunteered at least 45 hours (JD) or 15 hours per year

42 GRADUATES

earned Outstanding Achievement in Pro Bono: Volunteered at least 150 hours (JD) or 50 hours per year

Thank you to our incredible Class of 2025, who volunteered almost 12,000 pro bono and community service hours!

CENTER FOR SOCIAL JUSTICE
FIAT JUSTITIA

THANK YOU for your continuous support of the Center for Social Justice and the Pro Bono Program!

Please come and visit or contact us if you are a social justice organization and want to partner with us to work with our students and use the space.

Contact Us

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www.uclawsf.edu/center-for-social-justice/

www.instagram.com/csj.uclawsf/

www.linkedin.com/company/uc-law-sf-center-for-social-justice/

To donate to the Center for Social Justice, please scan the QR code:

EQUALITY ACTION CENTER

ANNUAL REPORT

2024-2025



RESEARCH FOR IMPACT

A Word From Our Director



The Equality Action Center has been working with colleagues to respond to the attack on DEI initiatives. In February we wrote an article in Harvard Business Review, “How to Assess the New Legal Risks of Your DEI Policies.” This spring I appeared on the American Bar Association Labor and Employment Section annual conference and webinar seminar series, discussing the future of DEI. EAC’s evidence-based approach–bias interrupters–both had proven effectiveness and does not single out any group for special treatment. Instead, it interrupts bias in business systems to ensure a consistent employee experience.

We are continuing to work with UCSF to equalize access to career-enhancing opportunities for medical faculty. This year we did three workshops with UCSF Division Chiefs, and built a tool that allows them to track access to opportunities. The National Science Foundation grant that supported this work was terminated abruptly halfway through our experiment. We are seeking alternative funding to continue our work.

We just received a $200,000 grant from the W.W. Kellogg Foundation, which will enable us to convene 20 to 30 companies to build their capacity to ensure a consistent employee experience in performance evaluations and access to opportunities.

We are also working with UCSF’s Innovation Ventures to explore options for commercializing our intellectual property. Stay tuned!

Our inaugural Partner Accelerator program launched in May in Washington, D.C. Participants loved it: virtually all the presenters and panels received the highest ratings possible.

I have also published a new book, Outclassed: How the Left Lost the Working Class and How to Win Them Back. My book tour has taken me to the Commonwealth Club in San Francisco, Politics & Prose in Washington, D.C., the Brooklyn Public Library in New York City, the Harvard Bookstore in Cambridge, Massachusetts, and Mrs. Dalloway’s in Berkeley. As of early June, the book has been reviewed or discussed in the Financial Times, Guardian, San Francisco Chronicle, Boston Globe, New York Post and I have appeared on MSNBC’s Morning Joe and National Public Radio stations in San Francisco and Los Angeles. In mid-May, in conjunction Andrea Dittman of USC Marshall School of Business, I launched the New Class Bubble Quiz, which helps people assess whether they’re middle class or elite; already we have over 16,000 responses. It’s fun, zany and will help our research.

Joan C Williams
Founding Director

OUR MISSION

Equality Action Center at UC Law SF seeks to advance racial, gender, and class equality in the workplace and in politics. Our initiatives address inequality at a structural level with concrete, evidence-based interventions. We lead programs that cultivate leadership and level the playing field for everyone. Our focus is pragmatic: our rigorous research is linked with practical steps to produce social or organizational change within a two- to five-year time frame.

OUR TEAM



JOAN C. WILLIAMS
FOUNDING DIRECTOR



DR. RACHEL KORN
RESEARCH DIRECTOR



DR. ASMA GHANI
LEAD RESEARCH SCIENTIST



CHELSEY CROWLEY
PROGRAM MANAGER



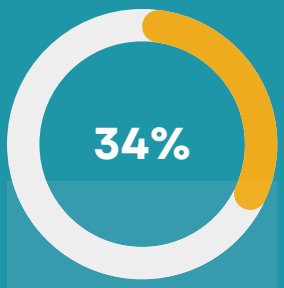
RYAN MALEK-MAPLE
PROGRAM ASSOCIATE



ALINA KILCULLEN
RESEARCH & POLICY FELLOW

ACCESS TO OPPORTUNITIES IN MEDICINE (ATOM) PROJECT

The ATOM (Access to Opportunities in Medicine) project was launched to address a major, but fixable, reason that women, and women of color in particular, leave the medical field – unfair access to career-enhancing opportunities. Equality Action Center, in partnership with University of California San Francisco, launched the Workplace Experiences Survey (WES) to investigate employee's perceptions of workplace culture and opportunities available to them and to determine whether there was a level playing field for all groups. Our results showed significant disparities between groups – with Black women, Latinas, and South Asian women reporting some of the worst workplace experiences.



Only 34% of South Asian women reported fair access to career-enhancing assignments compared to 85% of White men.



Almost 70% of Black women, Latinas, and South Asian women reported doing more administrative work compared to only 29% of White men.

In addition, we created the Faculty Tasking Tool, an evidence-based digital tool that allows Division Chiefs of a medical department to easily and systematically track the allocation of work opportunities given to their research faculty. Results showed disparities in the types of opportunities assigned to various groups.

To address these disparities, we created an evidence-based scalable intervention - a customized workshop for the Division Chiefs based on the data collected from the WES and the Tasking Tool, along with strategies to ensure that all groups can have fair access to opportunities in the workplace. As a result of this project, we hope to create a level playing field for all medical professionals and retain the best talent.

REPORT ON INEQUALITY IN THE RESTRUCTURING FIELD

Equality Action Center conducted a large-scale study, commissioned by the American College of Bankruptcy, to examine gender and racial bias in the restructuring field. The Workplace Experiences Survey (WES) was sent to lawyers at over 80 financial advisory firms, law firms, investment banks, and other types of organizations to document lawyers self-reported experiences of workplace culture.





Across these firms, data collected from 764 participants showed substantial levels of inequality in restructuring based on race and gender, age, disability, and LGBTQ+ status. These findings are documented in our most recent published report, “A New Plan of Reorganization: Gender and racial bias in the restructuring industry.” The report also includes our evidence-based Bias Interrupters toolkits – freely available resources that have been accessed over half a million times on our website – which firms in the restructuring industry can use to level the playing field for all groups.

LEADERSHIP ACADEMY



Our annual Leadership Academy is an executive education course empowering law firm partners and in-house counsel to stride confidently to the next level of their careers. With an action-oriented curriculum including strategic decision making, managing gender dynamics, and conflict resolution, participants leave the three-day program reenergized with the hard skills and new network to equip them for success.

The training helps cultivate leadership skills by enabling participants to increase their visibility and value to orgs by leveraging their talents and abilities more strategically. The Leadership Academy has been consistently referred to by participants as "life-changing" since the inaugural 2007 program and has been so impactful that we collaborated with a former attendee to launch a sister program for associates in 2025.

"Career-changing...Nobody ever teaches these things!... Our job is to ensure that female associates and partners at the firm are getting the same opportunities as male associates and partners, and that they know how to recognize and make the most of those opportunities."
– Stacey Rappaport, LAW alum & executive committee member, Milbank

ATTORNEY TRAININGS

Equality Action Center's celebrated and intimate attorney trainings distill nearly 30 years of research into practical, evidence based tools designed to help attorneys into the next phase of their careers.

PARTNER ACCELERATOR ACADEMY

Despite advances to gender equity in the workplace, women continue to be underrepresented in law firms at the partnership level. While over 50% of law students and law firm associates are women, they make up less than 24% of equity partners and less than 5% of partners are women of color. With an incredibly successful inaugural program in 2025, receiving perfect ratings from 90% of attendees, the Partner Accelerator Academy is a leadership training that empowers law firm associates to effectively navigate the partner review process and enter partnership with the momentum to succeed.

LEADERSHIP EDGE

Leadership Edge (LE) is a membership program for organizations that strive to level the playing field by addressing the structures that contribute to bias. An alternative to one-off trainings inspiring short-term action, Leadership Edge is designed to provide sustained support to orgs working to push the needle forward.

Programming includes leadership training, professional skill building, and action-oriented conversations around race, gender and first-generation professionals in the workplace. Access is org-wide and designed for both individuals and leaders, enabling organizations to effectively retain, support, and advance diverse talent from within and ensuring a consistent employee experience for all.

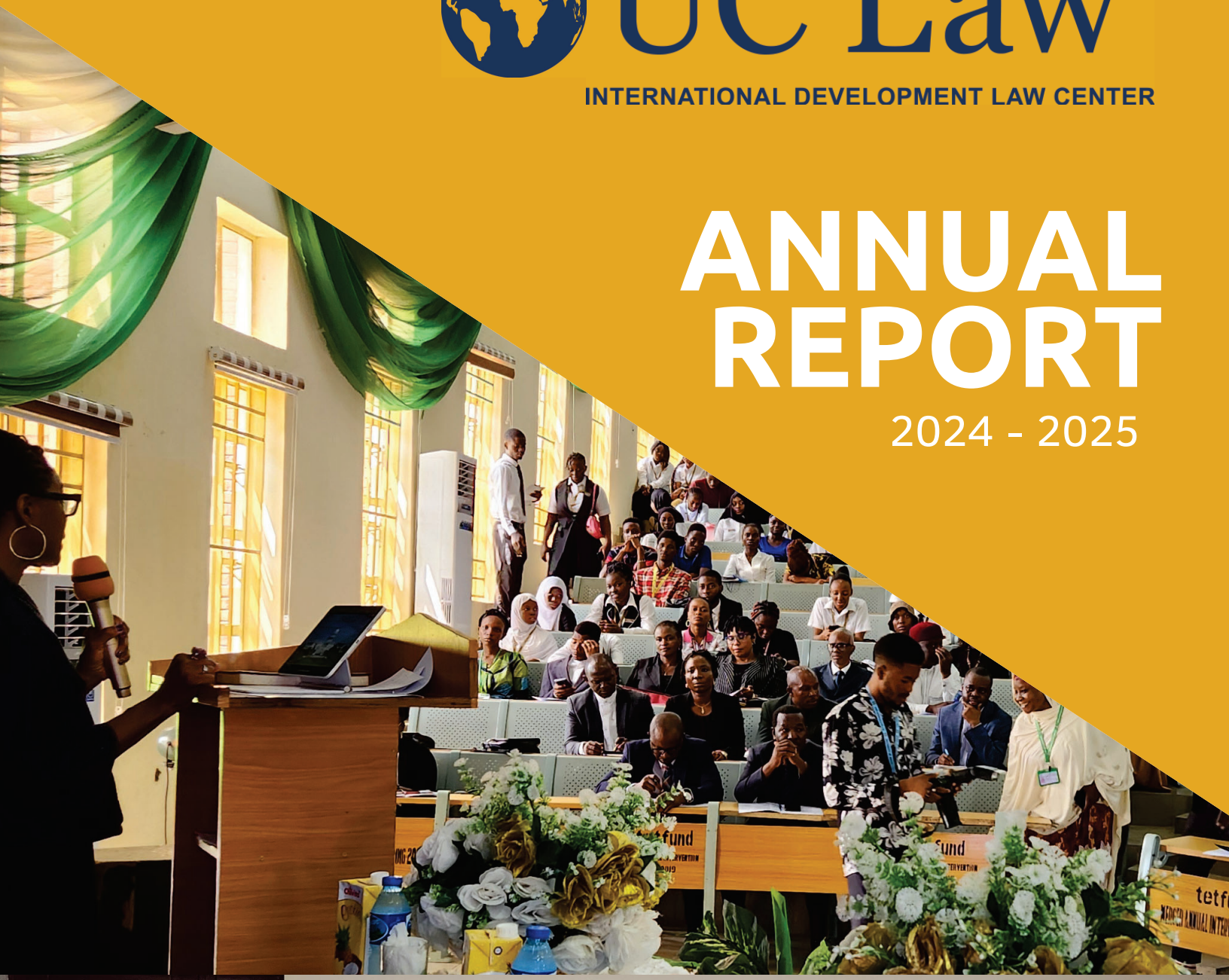


UC Law SAN FRANCISCO

INTERNATIONAL DEVELOPMENT LAW CENTER

ANNUAL REPORT

2024 - 2025





Annual Report – International Development Law Center – 2024-25

About the Center

With the formal establishment of the International Development Law Center in July 2022, UC Law SF now has a permanent home for international grant activities. The mission of the Center is to share international development expertise while providing research and learning opportunities for UC Law SF students, faculty, and graduates.

Past and ongoing projects have benefited from funding by the United Nations Food and Agriculture Organization (FAO), World Organization for Animal Health (WOAH), Pacific Community (SPC), United States Agency for International Development (USAID), Bureau of International Narcotics and Law Enforcement Affairs (INL) of the US State Department, and four U.S. Embassies: Ghana, Nigeria, Samoa, and Vietnam.

Recognizing that law is a key tool to tackle the world's problems, the Center seeks to inspire and provide concrete opportunities for the next generation of international development practitioners.

Kosovo

This year, the International Development Law Center continued implementing a multi-year grant from the US State Department Bureau of International Narcotics and Law Enforcement Affairs (INL) in Kosovo entitled, "Expanding and Improving Practical Legal Education in Kosovo." From 2022 through 2024, we partnered with University of Prishtina Faculty of Law (UP) for this project, which was designed to improve skills training at UP and share best practices in clinical legal education.

In October 2024, UC Law SF hosted two faculty members from UP, Professors Iliriana Islami and Furtuna Sheremeti. The visitors participated in a series of academic and observational sessions, engaged in cross-cultural discussions, and shared insights on global legal issues. The delegation was welcomed by UC Law SF Academic Dean & Provost Morris Ratner, who expressed his appreciation for the support of the U.S. Government to bring this partnership to fruition. After the formal welcomes, the delegation observed various classes and clinics, attended a roundtable lunch with several UC Law SF professors and students, and visited the United States Court of Appeals for the 9th Circuit, located in the historic James R. Browning U.S. Courthouse, which is within walking distance of UC Law San Francisco.



Visit to the historic 9th U.S. Court of Appeals building

In November 2024, UP hosted, in Kosovo, UC Law SF Adjunct Professor Claudia Cantarella, an affiliated expert with the International Development Law Center. Over five days, Prof. Cantarella gave a series of academic lectures and shared insights on pressing legal issues, in particular artificial intelligence.

In December 2024, Professor Howard Fenton, an affiliate of the Center, traveled to Kosovo under the auspices of the grant. Professor Fenton brought extensive experience, having previously contributed to various initiatives in Kosovo over many years. During the visit to Kosovo, Professor Fenton delivered a series of lectures and workshops on comparative administrative law systems, with a focus on practical application of legal education in an international context. His visit was also an opportunity to engage with local faculty on curriculum development and pedagogy. The visit also included a trip to Prizren University, where Professor Fenton discussed with academic staff their academic programs and delivered a public lecture.

Finally, UC Law SF hosted Professors Qerim Qerimi and Ardrit Gashi, from UP, in San Francisco. They observed law school clinics and lectures, held 1:1 discussions with UC Law SF faculty members, met with law school administrators, and visited local institutions. These activities provided the Kosovar visitors with insight into the workings of the U.S. legal education system, students' clinical and experiential opportunities, and strategies for providing academic instruction and support. The visit coincided with a visit by Prof. Binh Ha of Ho Chi Minh City University Law School, which is UC Law SF's partner under a new grant from the U.S. Consulate in Vietnam.



Welcome dinner for Kosovar and Vietnamese law faculty

Nigeria

This year, the International Development Center continued implementing a generous grant from the U.S. Embassy in Nigeria. During a week-long trip in July 2024, Senior Assistant District Attorney (ADA) Demarris Evans and UC Law SF Professor of Practice Jessica Vapnek visited Nigeria to deliver a series of lectures and share experiences from the U.S. legal system. During their trip, one or the other of the visitors presented public lectures in Abuja and in Keffi, engaged with clinical law students, discussed pedagogy and curriculum

with Nigerian law faculty representatives, and met with civic leaders and U.S. Embassy staff. They also participated in a variety of other individual and group meetings.



Ms. Bella Ndubuisi of the U.S. Embassy welcomed attendees to a public lecture on corruption and a panel discussion on money laundering, at the University of Abuja

In September 2024, UC Law SF hosted a delegation of professors from our two partner Nigerian universities: the University of Abuja and Nasarawa State University. The visiting group included the Dean and Vice Dean of Nasarawa State, the outgoing Dean and Clinic Director at University of Abuja, and the project liaison. The purpose of the visit was to continue strengthening the collaboration among our law schools, creating opportunities for a lasting academic exchange. Over the course of the week, UC Law SF professors welcomed the delegation into their classes and clinics. The delegation also had an opportunity to observe oral argument at the California Supreme Court.



The Nigerian delegation outside the California Supreme Court

In December 2024, UC Law SF Clinical Professor Mai Linh Spencer traveled to the University of Abuja, supplementing grant funds with Center funds, to conduct a three-day Training of Trainers for law faculty from 10 Nigerian law schools. Entitled "US-Nigeria Peer-to-Peer Clinical Legal Education Knowledge Exchange for Law Teachers," the program included multiple interactive workshops designed to introduce clinical pedagogy to Nigerian law faculty who already teach a clinic, plan to start a new clinic, or want to incorporate experiential learning into their doctrinal courses. A total of 40 Nigerian professors attended, and the University of Abuja hopes to scale the training to reach additional faculty in other areas of the country.

Pacific Community

This year, UC Law SF and the International Development Law Center continued implementing a third successive grant from the Pacific Community (SPC), an intergovernmental organization based in Nouméa, New Caledonia, for a project that aims to strengthen the legal capacity of Pacific Island countries and territories in coastal fisheries and aquaculture. The grant also gives opportunities to UC Law SF students and graduates to take part in internships and externships at SPC, whether remote or in person. Furthermore, UC Law SF offered, for the third time, an asynchronous course on legislative drafting in coastal fisheries and aquaculture for fisheries officers and lawyers from across the Pacific Region wishing to gain experience in legislative drafting. Professor of Practice Jessica Vapnek and SPC colleagues designed and created the course during a prior iteration of the grant.

Samoa

The International Development Law Center was delighted to receive a grant this year from the U.S. Embassy in Samoa for the project, "Legislative Drafting Training for Fisheries and Legal Officers." This project is jointly implemented by the UC Law SF and the Pacific Community (SPC). Representatives of UC Law SF, with support from SPC, trained fisheries officers from Samo's Ministry of Agriculture and Fisheries, along with representatives of the Attorney General's Office, on legislative drafting. This activity was intended to help Samoa to cover its critical gap in human resources. With few attorneys in the country, fisheries officers in Samoa are often the officials who have to draft regulations to protect key fisheries resources from overfishing or illegal harvest. However, because they lack legislative drafting training, these officers often produce inadequate first drafts which then languish at the Attorney General's office for lack of staff.



Attendees at the drafting workshop in Apia, Samoa, in November 2024

Togo

The Center received a grant this year from the U.S. Embassy in Togo, on the subject of disability rights. Most government providers and civil society organizations (CSOs) in Togo do not have knowledge of the rights of persons with disabilities, how to work with persons with disabilities, or how to ensure that persons with disabilities receive the information and support they need. Nor do many government officials understand their duties towards persons with disabilities. The grant included two planned activities. First, UC Law SF faculty and affiliates would train government workers, justice officers, and representatives of CSOs on disability rights, using a training-of-trainers model and preparing training materials so that attendees would be equipped to continue disability rights training after the close of the grant period. Second, relying on a local partner, the grant intended to create an open access online portal to share knowledge and the training materials about disability rights. Unfortunately the U.S. Government cancelled this grant in spring 2025.

Vietnam

The Center was delighted to be awarded a grant from the U.S. Consulate in Vietnam to support an exchange with Ho Chi Minh University Law School (HCMU). In January 2025, UC Law SF hosted HCMU Professor Binh Ha in San Francisco. She observed UC Law SF clinics and lectures, attended a roundtable discussion with UC Law SF faculty, met with law school administrators, and visited local institutions. These activities provided her with insight into the U.S. legal education system, American law students' clinical and experiential opportunities, and how local judicial institutions operate and welcome law student interns.



Prof. Ha (center, flanked by two Kosovar law professors) visited Prof. Debra Bogaard's Negotiation class to present about negotiation practice in Vietnam

Soon after the arrival of a new presidential administration, UC Law SF was informed that this grant was frozen. After providing certain information and certifications, UC Law SF received a modified grant agreement, and we were delighted to hear that activities could resume. Professors Vapnek and Spencer of UC Law SF will travel to Vietnam in September 2025 for a reciprocal visit to HCMU focused on clinical legal education and legislative drafting.

Other Activities

In addition to travelling to and hosting visitors from our partner countries, the International Development Law Center prepared several proposals, for potential projects in Albania, Cook Islands, Hong Kong, Poland, Slovenia, Timor Leste, and the United Kingdom.

A Thank You to Our Donors

The International Development Law Center was incredibly grateful to receive several donations from alumni and friends of UC Law SF. One donor pledged to match up to $25,000 of donations. We are so thankful for our donors, especially in this era of cuts to international aid. With your help, and with key support from the UC Law SF administration and board of directors, we are hopeful we can continue our important international work, involving and inspiring UC Law SF students and building enduring connections with our international partners. Please consider a donation of any size here: https://lnkd.in/grm_QRtH



Jessica Vapnek
Faculty Director





LexLab

Annual Report

2024-25

Mission Statement

To prepare students to be technology lawyers who provide outstanding counsel to clients navigating rapid technological evolution, contribute thoughtfully to global technology regulation efforts, and lead the legal profession through the ethical and forward-thinking adoption of new technologies.



Maria Clara Ribeiro Siqueira '25 and Justine Caedo '25 say UC Law SF's Technology Law and Lawyering Concentration provided specialized skills, industry insights, and mentorship that helped them translate their passion for tech and innovation into fulfilling career paths in transactional law, privacy, and AI.

Message from our Director of Applied Innovation



Tal Niv, Professor & Director of Applied Innovation

The legal landscape is rapidly evolving due to advancements in AI technology, creating unprecedented opportunities for innovation. Our institution is uniquely positioned to lead in this transformation by integrating AI into legal education and practice. We aim to be recognized as a top institution in tech law, fostering a culture of excellence and ambition. Our goal at LexLab is to not only adapt to changes but to be **pioneers in shaping the future of tech law and AI governance**.

We are excited about the transformative potential of AI in the legal field. As we navigate through turbulent times, we believe that striving for excellence and innovation will position our school, at the forefront of this evolution. In the face of uncertainty, our choice to drill down on these topics ensures we remain relevant and impactful in a very fraught environment for the profession and for academic institutions.

Embracing AI allows us to redefine our approach to legal challenges, preparing our students for the future. Our commitment to practical, hands-on training equips our students to tackle real-world challenges effectively and gives them a leg up compared to graduates from other schools.

Our primary goal is to establish a leading tech law program that bridges the gap between legal education and the rapidly evolving tech ecosystem. We aim to create a vibrant community and position ourselves as thought leaders in the field of tech law.

Our Team



Tal Niv, Professor &
Director of Applied Innovation



Drew Amerson,
Director of LexLab



Alisa Sedneva
Fellow

Committed to Technology Lawyering

Our **Technology Law and Lawyering concentration** prepares students to challenge the status quo as technology and globalization accelerate change in the delivery of legal services. With a curriculum updated for the age of AI and platform governance, the program bridges legal knowledge with practical tools. Students learn directly from legal leaders at top tech companies—through lectures, externships, and hands-on clinics—gaining experience with the real-world challenges faced by companies at the forefront of innovation.

Student Testimonials

- "**The Tech Law Concentration is one of the most forward-thinking programs at UC Law SF**. Courses don't just teach legal theory—they prepare you to practice law in real-world tech environments, with up-to-the-minute updates and industry guest speakers."

- "Being in San Francisco meant that our AI and product counseling courses weren't hypothetical. **We were engaging with real issues, right as they were unfolding, and learning directly from the people shaping them**."

- "These experiences made me feel not just like a student of law, but like a future contributor to the innovation ecosystem. **I've gained the practical skills and confidence to step into real-world challenges at the intersection of law and technology.**"

- "The classes are interesting and have been some of my most important classes for real-life law and business skills. For example, the Justice Tech class got me an internship at a startup that was part of the LexLab incubator last fall. Also, the Legal Ops class impressed all my interviewers and was a huge help in answering a surprise technical question in my interview for Airbnb. **I felt like a superhero for knowing things most other law students don't learn until years into their career.** Needless to say I got the job, and I do owe it in part to these classes."

Community Events

Keeping in mind our goals of creating a vibrant community, fostering strong partnerships with Bay Area tech companies and alumni, and cementing our position as a thought leader in the field of tech law, LexLab hosted 18 events over the past year. Several of our events were open to the public and drew large crowds, including our annual Privacy Day and Demo Day events. We also introduced a more intimate lunch and learn series for our students to connect with leading tech lawyers.



California State Senator Scott Wiener delivering the keynote address at our annual Pricavy Day event, that drew more than 150 attendees.

Tech Law Table Talks



"LexLab has been an incredible resource—not just for learning but also for meeting professionals in the field. Through their weekly Tech Law Table Talks, I've heard directly from attorneys and business leaders at companies like Meta, OpenAI, GitHub, and Microsoft. These conversations have given me a better sense of the industry, available career paths, and how the challenges tech lawyers are facing today relate to the theoretical learning we have been doing in class."

-Maria Clara Ribeiro Siqueira '25

Justice Technology Accelerator



Students and startup founders celebrating at Demo Day '24

Fall 2024 marked the seventh installment of LexLab's legal technology accelerator program. Partnering with gener8tor, Village Capital, Dream.Org, and the Justice Technology Association, we supported eight justice tech startups. Those companies joined the students in our "Building a Justice Tech Startup" class to compete before a panel of judges at Demo Day. The $5,000 grand prize was claimed by Thurgood, which helps attorneys and advocates resolve wrongful termination disputes and other employment matters. Advocord, a life management platform for guardians, and Redo.io, which uses data science for criminal justice reform, each took home $2,500 as runners-up.

New for 2025:
Law & AI Certificate (LAIC) Program



This July, we are launching a weeklong professional development course in Law and Artificial Intelligence. Held in an intimate setting, the program offers participants a rare opportunity to engage directly with a distinguished faculty of legal and industry leaders—including counsel, entrepreneurs, and policymakers from Anthropic, OpenAI, Meta, Microsoft, GitHub, Everlaw, and the European AI Office.

The LAIC program offers a comprehensive, internationally focused training, providing legal and compliance professionals with essential, globally relevant domain knowledge and practical skills. Participants will receive the Law & Artificial Intelligence Certificate (LAIC), which will set them apart as experts in this groundbreaking field.

Very special thanks to our community partners:

- IAPP
- Dream.org
- Women in Security & Privacy
- Justice Technology Association
- Gener8tor
- Village Capital

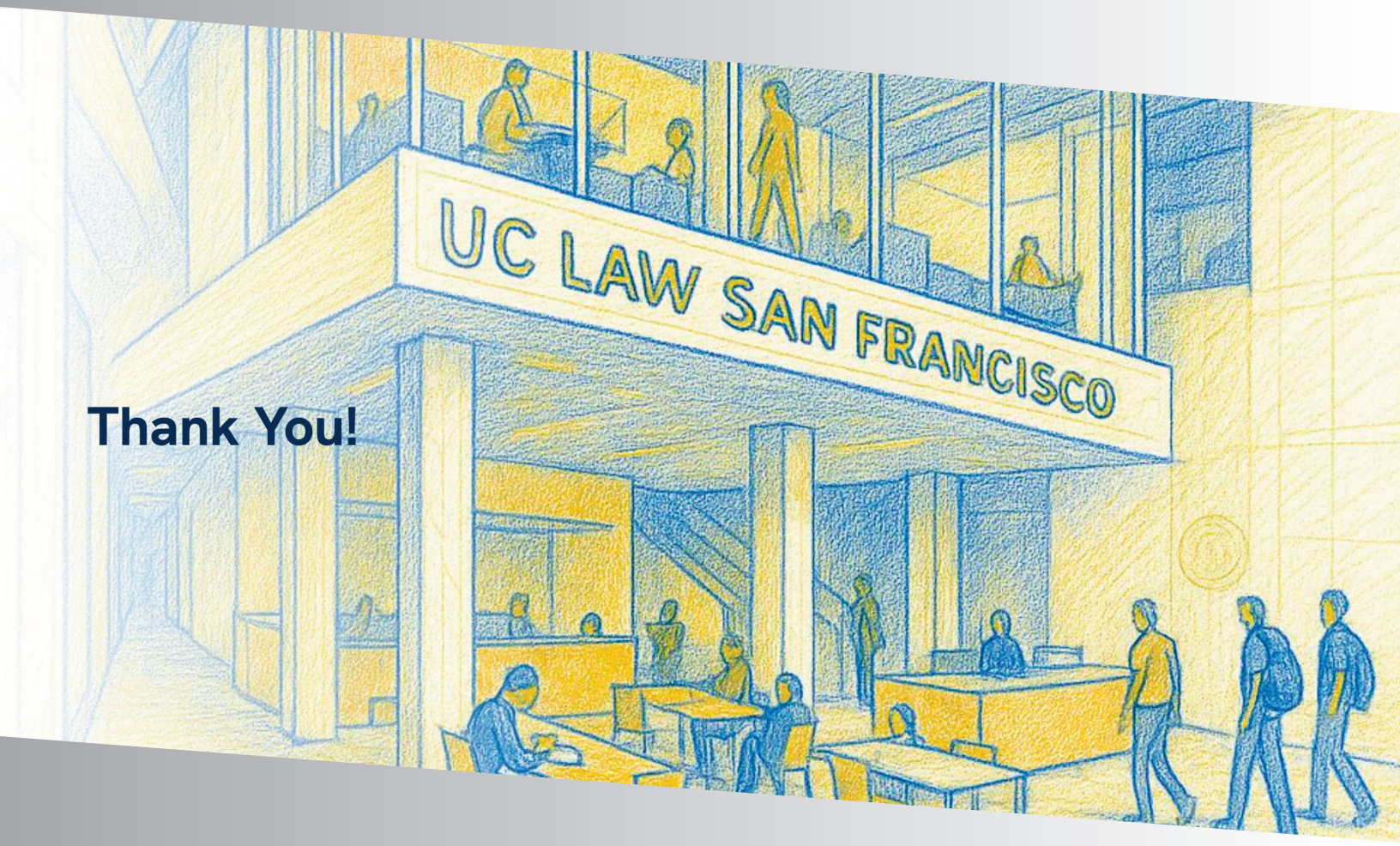
Donate to LexLab:

Address

200 McAllister, San Francisco, CA 94102

Website

www.lexlab.uclawsf.edu



Thank You!

CONSORTIUM ANNUAL REPORT

2024-2025



UCSF–UC Law

CONSORTIUM ON LAW, SCIENCE & HEALTH POLICY

Our Mission

The Consortium leverages law and policy to address the conditions in health care systems and society that together enable health and well-being. We envision a world in which all individuals and communities can attain the highest level of health possible, defined on their own terms. To this end, the Consortium builds multidisciplinary and multistakeholder collaborations among faculty and students of UCSF and UC Law SF and the patients, clients, communities, and organizations we serve alongside. Through these collaborations, we engage in education and training, research, and public service that advances health and health equity. In all areas, the Consortium's work is guided by core values of empathy, intellectual and academic integrity, and optimism.



Who We Are

LEADERSHIP TEAM

Sarah Hooper	Executive Director; Professor of Practice
Mallory Warner	Associate Director
Rachel Blanchard	Project Coordinator

CONSORTIUM ADVISORY BOARD

Benjamin Barsky	Associate Professor of Law, UC Law
Janet Coffman	Co-Director, HPL Program; Professor, UCSF
Simone Combs	Community Member
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Sarah Garrett	Assistant Professor, UCSF
George Horvath	Associate Professor of Law, UC Law
Lynn Leng	Medical Student, UCSF-UCB JMP
Antwan Matthews	Community Member
Emily Murphy	Professor of Law, UC Law
Kelvin Quan	Community Member
Taylor Quintana	HPL Class of 2024
Kassie Williams	JD candidate, UC Law

Student Spotlights



JD Graduate Spotlight

Sierra Burgon recently graduated from UC Law, where she served as co-president of the Health Law and Policy Society. Sierra gained several health law experiences throughout her time at UC Law, including working at the UC Office of the President, the Medical-Legal Partnership for Seniors Clinic, Kaiser Permanente, and the American Medical Association's Advocacy Group. Sierra is passionate about determinants of health and the law.



HPL Graduate Spotlight

Kahn Ryu recently graduated from the UCSF-UC Law SF Master of Science in Health Policy and Law (HPL) program. During his time with the HPL program, Kahn volunteered at the UCSF Parnassus Heights Emergency Department. He also volunteered as a Mandarin interpreter during home visits through the Medical Legal Partnership for Seniors Clinic assisting with advanced healthcare directives.



Graduating students in the JD Concentration in Health Policy & Law!



The graduating HPL cohort!

Health Justice Event Series

Bridging the Gap: Exclusionary School Discipline and Health Justice: This conference featured researchers, public health practitioners, clinicians, attorneys, and community advocates whose research agendas and practice examine exclusionary school discipline's implications for health equity. The conference advanced an interdisciplinary research and policy agenda to diminish disparate exposure to exclusionary school discipline and promote positive childhood health and wellbeing.





Patients, Providers, Pills, and Personhood Post-Dobbs: This conference focused on the health-justice impacts of the Dobbs decision repudiating the constitutional right to abortion.

Survival, Healing, and Performance: Formerly Incarcerated Voices on Health Justice Inside and Out: This event featured solo theater performers who shared their personal experiences of seeking medical care or caring for others in the criminal justice system. The performers shed light on the injustices entrenched within the carceral system, including systemic obstacles to adequate healthcare and the poor treatment endured by incarcerated individuals, especially those from marginalized racial backgrounds. Watch the performance recording here.



Reforming Systems Driving the School to Prison Pipeline

The California Institute on Law, Neuroscience and Education recently completed a state-by-state comparative analysis of legislation on screening and interventions for dyslexia, language learning disorders, and early literacy issues in the United States. The results of this project are forthcoming in "Screenings for Dyslexia, Learning Disorders, and Literacy Issues: A U.S. State Legislative Comparative Framework," in Volume 45 of Loyola University Chicago, Children's Legal Rights Journal (2025).



Building Health Systems' Capacity to Address Patients' Legal Needs



The team behind PlanforClarity, a 50-state tool developed to help patients and their caregivers understand and navigate legal and financial planning for care, has received a three-year grant from the AARP Foundation.

With this generous support, the team is building a new health care team-facing portal with tools and resources to screen for and address patient and caregiver needs.

The Clarity team will also add content for Puerto Rico and about workplace protections for working elders and caregivers. The new provider facing portal is being developed with input from interdisciplinary colleagues and older adults and will launch in July 2025. Training and consults will be available to health care teams across the country for free.

Advocating for Older Adults at Risk of Institutionalization and Conservatorship

MLPS clinic students, faculty and attorneys support one of San Francisco's most vulnerable groups — low-income, homebound older adults. UCSF and VA healthcare providers connect these seniors with the MLPS clinic, where our advocates step in to perform a "legal check-up" and offer free, comprehensive legal assistance. Recent successes include:



- Restoring our client's Section 8 voucher and successfully advocating for his reasonable accommodation request for a live-in aide
- Helping our veteran client avoid institutionalization and qualify for a little-known free Medi-Cal program for married couples. His wife can now get paid to provide home care for him which will increase their household income.
- Increasing the monthly Calfresh/Food stamps allocation by over $100 per month for our formerly homeless client
- Obtaining a waiver of a veteran client's debt with Social Security

Reducing Health Care Cost to Consumers by Addressing Root Causes

The Source on Healthcare Price & Competition ("The Source") works to improve the affordability of health care and address failing health care markets through evidence-based policy solutions. Student Fellow Dilani Logan and Katie Gudiksen published "The Corporate Practice of Medicine: Time for a Reevaluation?" examining laws restricting corporate oversight of physician practices, which will soon be followed by a new webpage on the Corporate Practice of Medicine.

In the past six months, Executive Editor Katie Gudiksen and Source team member Robert Murray coauthored two articles, "Americans Always do the Right Thing: When Will the U.S. Finally Control Runaway Hospital Price Growth?" and "U.S. State-based Hospital Rate Setting: What Worked, What Didn't, and What We Need to do Now", as well as "Rate Regulatory Handbook: A Guide for State Implementation of Cost Constraint Models". All of these resources are included on their newly revamped Provider Rate Regulation page.



Connect with the Consortium!

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uclawsf.edu/academics/centers/consortium/

UCSF-UC Law Consortium

200 McAllister Street
San Francisco, CA 94102
consortium@uclawsf.edu

Donate to the Consortium

WorkLife Law Annual Report

2024-2025



Co-Directors: **Jessica Lee & Liz Morris**

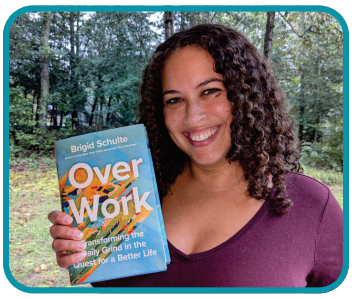
Message From the Co-Directors

Dear Friend of WorkLife Law:

As we reflect on this transformative year, we see a period that tested our resilience and reaffirmed our mission in equal measure. When we stepped into our new role as Co-Directors twelve months ago, we promised to remain steadfast in fighting for a future where all people have the freedom to care for their loved ones and protect their own health without jeopardizing their economic security. That promise has never felt more urgent.



We began this year celebrating the 60th anniversary of Title VII at the Biden White House. Now we find ourselves living Project 2025—the Department of Education is being dismantled, the EEOC is being weaponized, immigrants work in fear, federal workers are being laid off in droves, and our communities are losing critical programs that support working families.



Yet through it all, we're still fighting. We're still standing with you, our partners, and the communities who need us most. We're still driving change that improves lives.

In our first year as Co-Directors, WorkLife Law launched new projects with grassroots partners, created policy and legal changes that make it easier for caregivers to meet their families' basic economic and health needs, and provided life-changing assistance to hundreds of workers and students through our free legal helpline. WorkLife Law has remained at the forefront of the national movement for work and family justice, while intensifying our focus on serving the people most at risk.



In the pages that follow, you'll find a snapshot of WorkLife Law's impact this year—victories won, partnerships forged, and lives transformed. We invite you to dive deeper into our work and discover how together we're building a more just future for working families.

With gratitude and determination,
Liz Morris and Jessica Lee
Co-Directors, WorkLife Law



Special thanks to Dean and Chancellor David Faigman, Academic Dean Morris Ratner, our Advisory Board, and our numerous supporters who make our work possible.

Our Team



Jessica Lee
Co-Director



Liz Morris
Co-Director



Juliana Franco
Senior Staff Attorney



Cynthia Calvert
Senior Advisor



Rebeca Garcia
Communications & Grant Manager



Pem Brown
Administrative & Accounting Associate



Leah Kennedy
Staff Attorney



Jessica Dimas
Reproductive Justice for Farmworkers Legal Fellow

Our Advisory Board

Donna Benton, PhD, Director, USC Family Caregiver Support Center/LACRC
Sarah Brafman, Special Counsel for Economic Opportunity, Office of New Jersey Governor Phil Murphy
Susan Crumiller, Founding Partner, Crumiller: The Feminist Litigation Firm
Chris Ho, Director, National Origin and Immigrants' Rights Program, Legal Aid at Work
Julian Burns King, Founding Partner, King & Siegel
Jen Liu, Managing Partner, Katz, Banks, Kumin
Sarah Mehrotra, Maryland Governor's Office for Children
Linda Moore, MD, MPH, Premise Health, Occupational Medicine Physician
Sabrina Ross, Privacy and AI Policy Director, Meta
Tina Sherman, National Director, Maternal Justice, MomsRising
Gillian Thomas, Senior Staff Attorney, ACLU Women's Rights Project

OUR MISSION

The Center for WorkLife Law at the University of California College of the Law, San Francisco is a national research and advocacy organization that seeks to ensure no person is forced to choose between economic security and their family's health and well-being. The Center advances gender and racial equity by building legal rights for pregnant people and family caregivers at work and in education.

Changing Public Policy and Expanding Legal Rights

WorkLife Law drives systemic change by equipping lawmakers, civil rights agencies, and other changemakers with tools to strengthen legal rights for pregnant people and family caregivers. This year, our expertise shaped protections nationwide, from New Jersey's pregnancy accommodation guidance to California's enhanced Paid Family Leave programs.

State-Level Victories Deliver Real Impact: Illinois became the sixth state to prohibit caregiver discrimination after adopting WorkLife Law's model policy—creating the strongest protections yet for millions of workers balancing jobs with family care. We're now partnering with local leaders to ensure equitable implementation and public awareness of these new rights.

New York and Washington joined three other states in requiring that lactation breaks be paid, advancing health equity for postpartum workers and their babies. For years, WorkLife Law has led the way in calling for paid pumping breaks as a critical measure in ensuring all families can afford to breastfeed. To learn more, check out our policy brief Making Lactation Breaks Affordable for All.

Protecting Student Parents' Economic Futures:
WorkLife Law's Pregnant Scholar program advocates for policy changes to support the millions of pregnant and parenting students pursuing higher education, the majority of whom are people of color and women. Removing the systemic barriers these students face to academic success ensures their families have an equal shot at the economic security their degree provides. In January, we shifted our focus from the federal Department of Education to the states, developing groundbreaking model policies and building the case for stronger state-level protections that keep student parents in school.

Shaping New Federal Laws: The Pregnant Workers Fairness Act and PUMP Act entered their critical second year, with strong EEOC and Department of Labor enforcement guidance shaped by our advocacy. Co-Director Jessica Lee kicked off the year at a White House roundtable with top federal officials on implementation strategy. Now, the battleground has shifted to the courts, where today's legal precedents will define workers' rights for generations. WorkLife Law experts spent the year providing intensive technical assistance to litigators—reviewing filings, crafting legal theories, and preparing attorneys for oral argument. Our interventions have already started to create favorable case outcomes, ensuring future workers don't have to choose between a healthy pregnancy and a paycheck.

"Reproductive justice means people should have the ability and resources they need to parent or not parent in the safety of their own community. This means that people are treated with dignity and humanely in their workplace. That they do not need to sacrifice privacy for a paycheck. And that they are not punished or denied the full benefits of their employment based on a decision to grow their family or not.

We simply cannot realize reproductive justice without the work of WorkLife Law."

- Liz Ling, If/When/How Senior Helpline Counsel

Directly Serving Workers and Students in Need

WorkLife Law's free legal support is "literally a godsend" to families on the verge of crisis. This year, we directly served hundreds of workers and students across 44 states and D.C., helping them safeguard their health and economic security.

Supportive Interventions That Prevent Crisis:
Through our free legal helpline, WorkLife Law attorneys provided on-demand guidance on leave and accommodations and early interventions with employers and institutions to prevent escalation and job loss. When necessary, we helped workers file charges with legal enforcement agencies and connected them with local resources and lawyers from our Attorney Network. Our early intervention approach protects livelihoods and health before situations reach crisis points.

In her fifth month of pregnancy. Claribel's arduous work picking berries was taking a heavy toll on her health, and she was forced to stop working. After the state of California denied her disability insurance claim, Claribel was unable to make ends meet. Thankfully, she learned about WorkLife Law's free Dar a Luz helpline from a local community organization. Shortly after we submitted an appeal on Claribel's behalf, the state agency overturned the denial and issued her over $10K in owed benefits.

One southern caller to our helpline, "Amanda," requested time off work for her abortion. Amanda had to travel across state lines to access care, but her boss said she was required to give 60 days' notice to take time off. Unable to risk losing her job, she waited. Five days before her scheduled procedure, Amanda was informed that her leave request was being denied.

Now well into a high-risk pregnancy, Amanda told her employer she was going to take the time off for a medical emergency. Amanda's employer told her she would face discipline if she didn't report to work. It was not until she spoke with WorkLife Law's helpline attorneys that Amanda learned she had a legal right to take leave for her abortion and was protected from discipline.

Expanding Our Strategic Partnerships:
Under DOGE, the federal government laid off thousands of civil servants in early 2025. WorkLife Law fielded a significant increase in calls from federal workers on our helpline and partnered with Rise Up: Federal Workers Legal Defense Network to provide specialized assistance on pregnancy, lactation, leave, and caregiving issues.

In Los Angeles, we're partnering with the LA Caregiver Resource Center to deliver legal services, helping their low-income clients access paid family leave and workplace protections without sacrificing care for their loved ones.

Our collaboration with Unbuckled—an organization supporting caregivers of children facing severe illness or disability—produced vital know-your-rights guides that have been distributed through children's hospitals and parent support groups.

"As a mother and executive who lost my job when my son was diagnosed with cancer, I understand firsthand the immense challenges of balancing work, life, and caregiving. By easing these burdens, we help families focus on what truly matters—caring for their children."

—Becca Newton, Unbuckled co-founder

Educating Workers, Students, and their Advocates

Legal rights make a difference only if people understand them and are able to use them when it matters most. WorkLife Law educates thousands of workers, students, and community changemakers on legal rights each year.

Training Key Stakeholders Nationwide: Our team delivered dozens of live trainings to over 2,500 participants. For example, Co-Director Liz Morris presented at the American College of Obstetricians and Gynecologists' Congressional Leadership Conference alongside former EEOC Vice Chair Jocelyn Samuels, using the Pregnant Workers Fairness Act as a blueprint to teach healthcare providers how to drive policy change in support of reproductive justice.

Creating Tools That Reach Hundreds of Thousands: We published 33 new or substantially updated resources, including guidance for abortion providers on workplace privacy barriers and a Title IX Communications Toolkit for college administrators. These materials reached hundreds of thousands of people this year.

Amplifying Our Message: WorkLife Law experts appeared in over two dozen major media outlets—including Newsweek, NBC News, and the Los Angeles Times—continuing to make the case for equity in education and workplaces nationwide.

Building Institutional Capacity: Co-Director Jessica Lee provided technical assistance on Title IX changes to administrators at over 60 colleges and universities, benefiting millions of students. Our Pregnant Scholar Initiative produced over a dozen new resources to spur institutional change and help pregnant students navigate their rights.



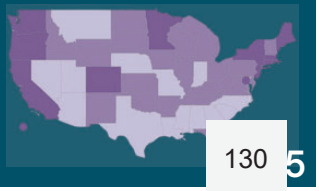
Activating the Community to Empower Pregnant Farmworkers

WorkLife Law trained 115 community health workers on how to support farmworkers during pregnancy. Dar a Luz, a partnership initiative with CAUSE, is breaking down barriers so farmworkers can access paid disability leave to avoid exposure to toxic pesticides , as well as paid family leave to promote maternal and infant health.

Featured Resources

In an Op-Ed for Ms. Magazine, Co-Director Liz Morris called for an end to policies that penalize workers for choosing to start a family, like those preventing women from accessing lucrative union jobs. WorkLife Law is proud to have filed an amicus brief in the ACLU's lawsuit challenging these unfair practices that hold women back.

Our new state law map gives pregnant and postpartum workers a comprehensive, easy-to-use guide to the various laws impacting their ability to get work accommodations, paid leave, and discrimination protection.



Report 5.2.4 – FY25 Grants Reporting

By Provost & Academic Dean Morris Ratner

Attached please find a memorandum and exhibits prepared by Director of the Office of Sponsored Projects Yael Nadel-Cadaxa. Maintaining and growing a healthy base of sponsored research was a key element of the 2020 Operational Strategic Plan, so as to increase our research and organizational capacity. As the attached memo demonstrates, we have achieved that goal over the past five years, thanks to the efforts of our creative and resourceful research centers, who have been supported by Director Nadel-Cadaxa, our General Counsel, and our Fiscal Office. Third-party funding has supported important research and programmatic activity. For AY24-25, some of that activity is highlighted in the attachments to accompanying Report 5.2.3.

MEMORANDUM

To: Provost & Academic Dean Morris Ratner

Cc: Associate Dean for Research Dave Owen

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

Date: August 12, 2025

Re: Sponsored Project Funding Report for Fiscal Year 2025

I. Background

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 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.

In furtherance of this role, OSP (in collaboration with the Office of Fiscal Services) conducts annual analyses of sponsored funding received by the College and tracks progress supporting and expanding sponsored projects over time. The analysis identifies the specific revenue codes/types constituting external funding for research (and other scholarly projects) and then categorizes and quantifies the various streams of funding.[1] For the purposes of the analysis, all streams of funding are referred to as "sponsored project funding."[2] This memo builds on prior analyses and incorporates FY2025 data, providing a more complete picture of sponsored project funding trends over time.

[1] 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 analyses are accurate and form a sound basis for analyzing historical and future trends in sponsored project funding. Further details on the definitions of and distinctions between revenue codes/types including in this analysis are provided in Appendix B.

[2] For the purposes of the analyses, "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 FY2025, $500,000 in revenue was received in FY2025, and $400,000 in expenses were incurred in FY2025, the "sponsored project funding" for that grant in FY2025 would be recorded in the analysis as $400,000. The remaining $100,000 in revenue received, but not spent, in FY2025, 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. 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

The overall results of the FY2025 year-end analysis are summarized in narrative form below and in the tables and figures in Appendix A. Additional details on the methodology of the analysis and different types of revenue categorized as "sponsored project funding" are included in Appendix B.

II. FY2017-FY2025 Overall Funding Summary

Total sponsored project funding recorded from FY2017-FY2025 was $58,955,271 and average annual funding from FY2017-FY2025 was $6,550,586.

Looking first at the sources of FY2017-FY2025 funding: the two largest sources of funding over the last 9 FYs were private grants/contracts (responsible for $20,967,401 or 36% of total funding) and non-exchange grants[3] (responsible for $14,332,172 or 24% of total funding); gifts/donations were the next largest source of funding ($7,466,135 or 13% of total funding); and the remaining funding came from state grants/contracts ($5,690,484 or 10% of total funding), city/county grants/contracts ($1,467,066 or 3% of total funding), and fee-for-service contracts, investment income, conference fees, dues/membership fees, and other sources (referred to hereinafter collectively as "other sources" of funding) ($4,798,329 or 8% of total funding).

Turning next to the recipients of FY2017-FY2025 funding: the recipient with by far most total funding over the past 9 FYs was the Center for Gender and Refugee Studies (CGRS), with $21,842,982 in funding (37% of total funding), the second largest recipients was the UCSF/UC Law SF Consortium on Law, Science & Health Policy ("Consortium"), with $13,045,787 (22% of total funding); when viewed together, the Center for WorkLife Law that operated from FY2017-FY2024 ["WLL (Legacy)][4], Center for WorkLife Law formed in FY2025 ["WLL (Successor)"], and Equality Action Center (EAC) were the third largest recipient of funding, with $11,584,413 in combined funded (20% of total funding); the Center for Innovation (C4i) was the fourth largest recipient with $6,910.105 in funding (12% of total funding); and, all other centers/faculty received a combined $5,571,985 in funding (9% of total funding).

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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.

[3] "Non-exchange grants" are classified as revenue provided to the Foundation 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.

[4] In FY2025, the Center for WorkLife Law (WLL) split into two separate centers – a "new" Center for WorkLife Law, led by co-Directors Elizabeth Morris and Jessica Lee, and Equality Action Center (EAC), led by Director Joan Williams. For purposes of this analysis, the center that operated from FY2017-FY2024 is referred to as "WLL (Legacy)" and the "new" Center for WorkLife Law formed in FY2025 is referred to as "WLL (Successor)", and each of those centers is treated separately from EAC. For clarity, the total funding received by each of these three centers from FY2017-FY2025 is as follows:

- WLL (Legacy): $9,313,760 (received from FY2017-FY2024)
- WLL (Successor): $1,180,294 (received in FY2025)
- EAC: $1,090,359 (received in FY2025)

III. FY2025-Specific Funding Summary

Turning to analysis of the most recent FY and recent trends, total sponsored project funding recorded in FY2025 was $9,856,034, which was substantially higher than both FY2024 (an increase of $2,558,300 or 35% over FY2024) and FY2023 (an increase of $727,211 or 8% over FY2023), and nearly equal to UC Law SF's previous funding record from FY2022. The increased funding level in FY2025 boosted average annual funding over the last 9 FYs to $6,550,586 (an increase of $413,181 or 7% over the average annual funding in the 8 FYs prior to FY2025).

Drilling down further to look at the composition of FY2025 funding between different sources: the largest share of funding came from federal, state, city/county, and private grant/contract awards ($4,960,132 or 50% of FY2025 funding), which was a substantial increase over funding from the corresponding sources in the prior FY (an increase of $800,790 or 19% over FY2024); a nearly equal share of funding came from gifts/donations and non-exchange grants ($4,149,213 or 42% of total FY2025 funding), which was an even larger increase over the prior FY (an increase of $1,471,298 or 55% over FY2025); and the remainder of funding came from other sources ($746,689 or 8% of total FY2025 funding) (hereinafter referred to as "other sources"), also showing an increase over FY2025 (increase of $286,212 or 6% over FY2024).

Looking to recent trends among the various sources of sponsored project funding, FY2025 saw near across-the-board increases in funding: non-exchange grant funding increased $808,005 (48% over FY2025); federal funding increased $722,323 (62% over FY2024)[5]; gifts/donations increased $663,294 (67% over FY2024)[6]; city/county funding increased $507,556 (293% over FY2024); and other funding increased by $286,212 (62% over FY2024). The only areas where we saw decreases in funding were state funding (decreased by $373,108 or -70% in FY2025) and private funding (decreased by $55,980 or -2%), but those decreases were vastly outweighed by gains in other areas, as evidenced by the substantial overall growth in funding.

Turning now to the different recipients of funding in FY2025: CGRS was by far the largest individual recipient of funding in FY2025 (as it was in 6 of the last 9 FYs) with $4,010,855 in funding (41% of the FY2025 total). The next largest individual recipients of funding were: C4i, with $1,415,073 (14% of the FY2025 total); WLL (Successor), with $1,180,294 (11% of the FY2025 total); EAC, with $1,090,359 (11% of the FY2025 total);

[5] As indicated in prior reporting and discussed below, given the current federal approach to grant-funded research, we do not anticipate continued growth in federally funded research. Further, the growth in federal funding in FY2025 was partially the result of federal funding recipients completing existing federal grant/subaward projects while their awards remained active and unimpacted by shifts in federal funding priorities. As a result, the majority of our federal awards are currently mostly (or fully) expended and thus billing in FY2026 will be reduced and we do not anticipate receiving sizable new federal awards in FY2026.

[6] The increase in gift/donation revenue in FY2025 was partially the result of a one-time, $1 million gift to UC Law SF from the Deb AI Fund, $500,000 of which was recorded as revenue in FY2025. The remaining $500,000 in revenue will be recorded in FY2026.

and the Consortium, with $994,270 (10% of the FY2025 total). Taken together, all other centers/faculty received a combined $1,165,182 (12% of total FY2025 funding).

Looking to recent trends, apart from the Consortium (which saw its funding decrease in FY2025), all other recipients saw their funding increase in FY2025, with CGRS seeing the largest uptick in funding (an increase $1,252,524 increase or 45% over FY2024), followed closely by C4i (an increase of $405,301 or 40% over FY2025). It is also worth noting that WLL (Successor) and EAC, which only began operating as separate centers in FY2025, each received over $1M in funding, roughly the same amount of funding as their previous combined center, WLL (Legacy), received in FY2024. Thus, WLL (Successor) and EAC effectively doubled the total funding they received in their first year operating separately.

IV. Analysis and Conclusions

Focusing exclusively on the raw data, FY2025 was a very positive year overall for sponsored project funding at UC Law SF. In addition to exceeding the funding totals from the two prior FYs, boosting average annual funding to a new record, and seeing near across-the-board increases in funding from all sources and to all recipients, FY2025 marked a reversal to overall funding trends from recent FYs (total funding decreased in both FY2023 and FY2024) and a reversion to prior trends of year-over-year funding growth (total funding had increased in each year from FY2017-FY2022).

This return to positive funding growth FY2025 is particularly notable coming at a time of broad cuts to federal grants programs, deep uncertainty about the future of federal funding, and the potential flow-down effects on the availability of and competition for funding from other sources. While the long-term impacts of these shifts in federal policies and priorities remain to be seen, early indications are that federal funding for research and other programs will be substantially reduced in FY2026, which may have flow-down effects on other sources of funding. In fact, we're already seeing signs that reductions in federal funding for research at the national level are prompting non-federal research funders to attempt to fill some of the funding gaps, which could conceivably result in more pressure being placed on non-federal funding sources and could result in greater competition for available funds. That in turn could negatively impact funding availability for UC Law SF projects. We are closely monitoring this and, while we have not yet seen this effect in the current FY, we anticipate that the long-term impact of the changing federal landscape will be downward pressure on overall funding in future FYs.

Beyond creating uncertainty about the future funding, the shifts in federal policies and related actions in the first half of 2025 (e.g., attempts to terminate existing federal grants programs, massively reduce the federal workforce, shutter entire federal agencies), plus the general level of confusion surrounding the nature, scope, and legality of these policies/actions, had a decidedly negative impact on researchers and administrators managing federal funds at UC Law SF (e.g., creating fear among researchers about whether their federal grants will be targeted, anxiety among administrators about whether grant expenses will be reimbursed).

To understand the real-world impact of these shifts in federal policies/actions, it's instructive to take a snapshot of what happened to UC Law SF's federal awards in the first half of 2025. At the start of 2025, UC Law SF held 14 active federal grants or subawards. Of those 14 federal awards, 13 had their payments paused or delayed, five were compelled to accept additional compliance burdens to avoid potential termination, six were actually targeted for termination, and, while five of those terminations were later rescinded as a result of legal challenges, one grant was ultimately terminated and the other five faced mandatory pauses in activities, spending, and payments. Amidst all these actions was a broader sense of uncertainty about what federal policies and actions were valid and what to expect moving forward, leaving researchers and administrators scrambling to ensure they could fund existing staff and ongoing activities and leaving them with a general state of anxiety about the future of their existing grants and federal grant programs in general. And, while much of the story remains to be written, what seems clear is that the current federal funding landscape will have a depressive effect on sponsored project work at UC Law SF, particularly on those centers and faculty that more centrally rely on federal funding to support their staff and activities.[7]

That said, while the outlook for federally funded programs is worrying, UC Law SF as a whole remains well-positioned to maintain a robust sponsored project funding base in the future years. Unlike many of our peer institutions, which rely almost exclusively on federal grants to support research and other scholarly programs, the bulk of UC Law SF's sponsored project funding comes from non-governmental sources (e.g., foundations, NGOs, individuals) and our research centers and faculty have developed and continue to strength their relationships with agencies, organizations, and individuals committed to supporting research and scholarship at UC Law SF, as evidenced by our continued ability to maintain (and expand) funding from non-governmental sources (e.g., gifts/donations, non-exchange grants, private grants/contracts). And, while year-over-year growth in funding is far from assured and any optimism should be tempered with the understanding that funding levels are heavily impacted by fluctuations in donor priorities, funding availability, grant lifecycles, and other economic, social, and political factors (much of which is outside our

[7]Multiple centers are particularly exposed to shifts in federal funding: Consortium, which holds multiple subawards under research grants from the Department of Health and Human Services (HHS) and has consistently relied on federal funding to support its staff and operations; CGRS, which holds a large subaward under an immigration contract from HHS and has a long history of federal grants and contracts work; WLL (Successor), which holds a subaward under a research grant from the Environmental Protection Agency (EPA) that may or may not be extended for another year; EAC, which holds a subaward under a research grant from the National Science Foundation (NSF) that also is up for an extension; Tax Law Center, which holds a large Internal Revenue Service (IRS) grant that funds a 1.0 FTE position; and International Development Law Center, which had one Department of State (DOS) grant terminated, will soon close its sole remaining DOS grant, has had multiple proposals rejected already in 2025, and relies almost exclusively on federal grants to support its international programs. For these centers, the concern is not simply about their existing grants/subawards (though this is concern is real, particularly for those grants/subawards with "out years" that have not yet been awarded), concern is about the future – will these and similar grants programs and the agencies that manage them even exist in the future and, if they don't, how will these centers adapt to a landscape of diminished funding and support for research.

control), a return to the prior growth trend is a promising development for UC Law SF's grants program and, regardless of where the winds blow federally, UC Law SF remains dedicated to supporting its grant-seeking faculty, staff, and research centers and advancing research and scholarship in higher education more broadly.[8]

[8] 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.

Appendix A: Tables and Figures

Table 1: Total Sponsored Project Funding FY2017 - FY2025				
FY	**Funding**	**% of Total**	**Variance from Prior FY**	**Variance from Average**
2017	$3,254,603	5.5%	N/A	($3,295,983)
2018	$3,523,844	6.0%	$269,241	($3,026,742)
2019	$4,793,032	8.1%	$1,269,188	($1,757,554)
2020	$4,852,344	8.2%	$59,312	($1,698,242)
2021	$6,351,074	10.8%	$1,498,730	($199,512)
2022	$9,897,784	16.8%	$3,546,710	$3,347,198
2023	$9,128,823	15.5%	($768,961)	$2,578,237
2024	$7,297,734	12.4%	(1,831,089)	$747,148
2025	$9,856,034	16.7%	$2,558,300	$3,305,448
Total	**$58,955,271**	**100%**		
Average	**$6,550,586**			

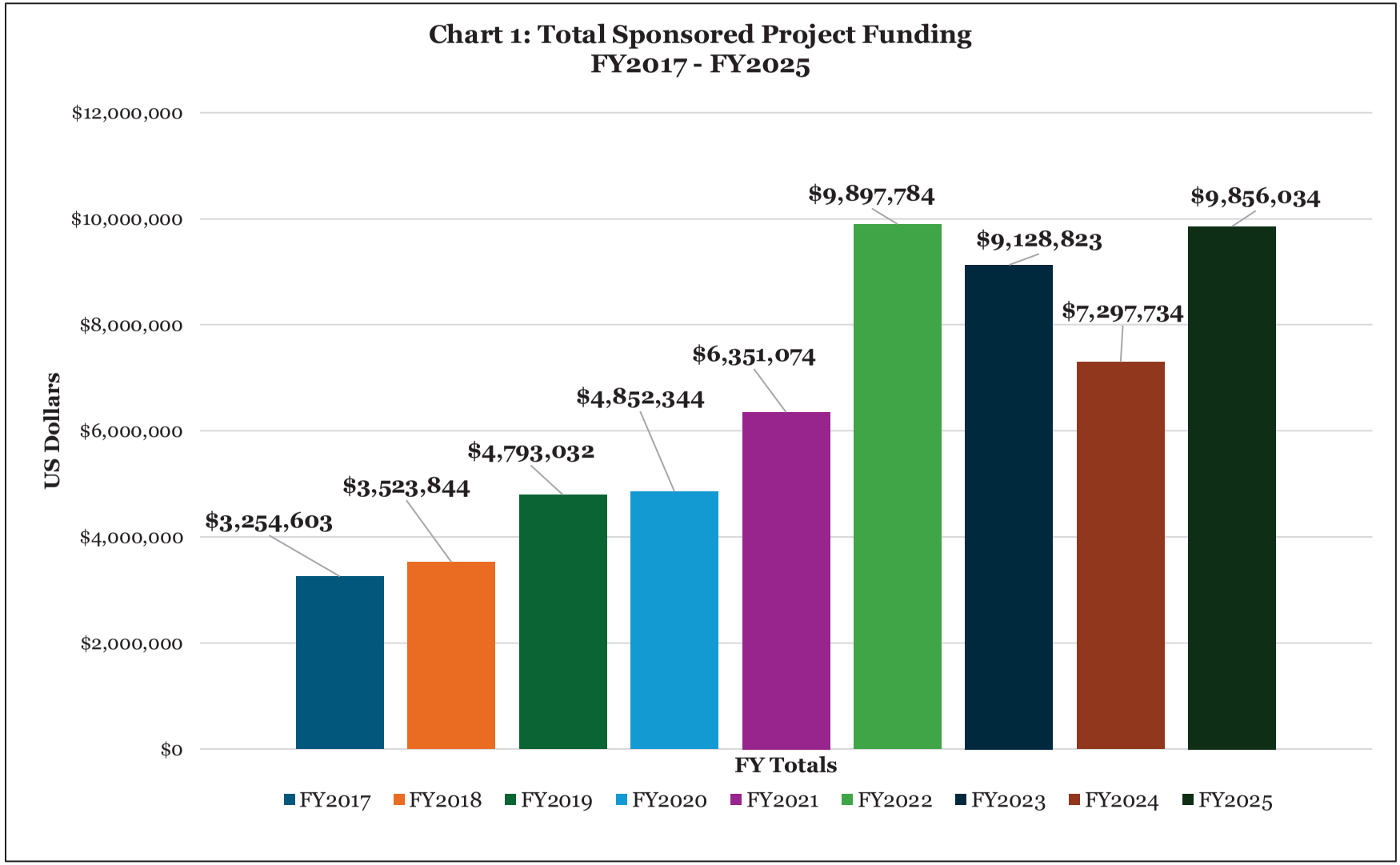
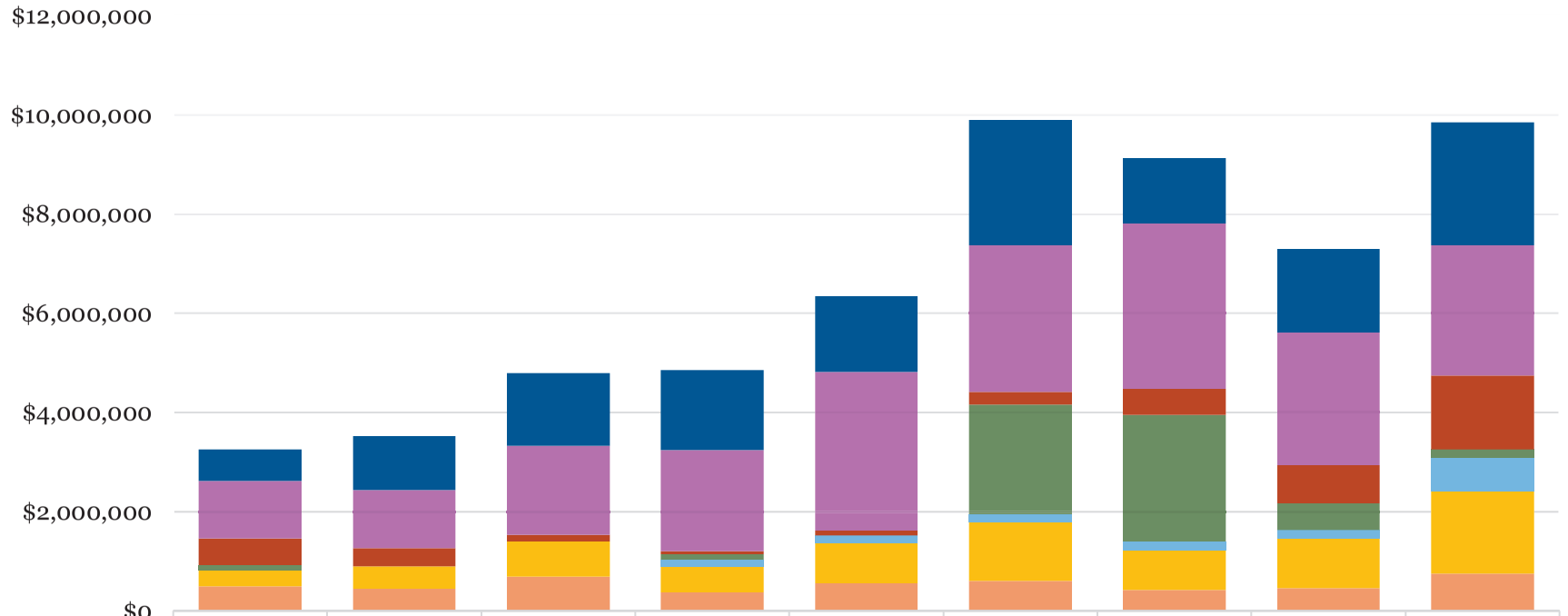

Chart 1: Total Sponsored Project Funding
FY2017 - FY2025
$12,000,000
$10,000,000
$8,000,000
$6,000,000
$4,000,000
$2,000,000
$0
US Dollars
$3,254,603
$3,523,844
$4,793,032
$4,852,344
$6,351,074
$9,897,784
$9,128,823
$7,297,734
$9,856,034
FY Totals
FY2017
FY2018
FY2019
FY2020
FY2021
FY2022
FY2023
FY2024
FY2025

Table 2: Sponsored Project Funding by Source (Total $) FY2017 - FY2025								
FY	**Federal**	**State**	**City**	**Private**	**Non-Exchange**	**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**
2024	$774,768	$536,472	$173,011	$2,675,091	$1,681,028	$996,887	$460,477	**$7,297,734**
2025	$1,497,091	$163,364	$680,567	$2,619,111	$2,489,033	$1,660,180	$746,689	**$9,856,034**
Total	**$4,233,685**	**$5,690,484**	**$1,467,066**	**$20,967,401**	**$14,332,172**	**$7,466,135**	**$4,798,329**	**$58,955,271**
Avg	**$470,409**	**$632,276**	**$163,007**	**$2,329,711**	**$1,592,464**	**$829,571**	**$533,148**	**$6,550,586**

Table 3: Sponsored Project Funding by Source (% of Total)[1] FY2017 - FY2025								
FY	**Federal**	**State**	**City**	**Private**	**Non-Exchange**	**Gift**	**Other Sources**	**% of Total[2]**
2017	16.6%	3.4%	0.0%	35.7%	19.3%	9.8%	15.2%	**5.5%**
2018	10.2%	0.0%	0.0%	33.4%	30.9%	12.9%	12.6%	**6.0%**
2019	2.8%	0.0%	0.0%	37.4%	30.6%	14.7%	14.5%	**8.1%**
2020	1.3%	2.3%	2.8%	42.0%	33.0%	10.9%	7.6%	**8.2%**
2021	1.5%	0.0%	2.4%	50.4%	24.1%	12.8%	8.8%	**10.8%**
2022	2.5%	22.4%	1.6%	29.9%	25.6%	12.0%	6.1%	**16.8%**
2023	5.7%	27.9%	1.8%	36.6%	14.4%	8.9%	4.6%	**15.5%**
2024	10.6%	7.4%	2.4%	36.7%	23.0%	13.7%	6.3%	**12.4%**
2025	15.2%	1.7%	6.9%	26.6%	25.3%	16.8%	7.6%	**16.7%**
% of Total[3]	**7.2%**	**9.7%**	**2.5%**	**35.6%**	**24.3%**	**12.7%**	**8.1%**	**100%**

[1] 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-FY2025.
[2] This column represents the total sponsored project funding recorded in each FY as a percentage of total sponsored project funding for FY2017-FY2025.
[3] This row represents the total FY2017-FY2025 sponsored project funding recorded from each source type as a percentage of total sponsored project funding for FY2017-FY2025.

Chart 2: Sponsored Project Funding by Source (Total $)
FY2017 - FY2025



	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025
Non-Exchange	$628,301	$1,088,524	$1,467,748	$1,602,977	$1,531,037	$2,529,423	$1,314,103	$1,681,028	$2,489,033
Private	$1,162,007	$1,175,336	$1,794,870	$2,040,363	$3,203,784	$2,956,160	$3,340,681	$2,675,091	$2,619,111
Federal	$539,098	$360,641	$133,779	$62,673	$93,480	$249,117	$523,038	$774,768	$1,497,091
State	$110,450	$0	$0	$112,395	$0	$2,217,892	$2,549,912	$536,472	$163,364
City	$0	$0	$0	$137,493	$154,392	$153,793	$167,810	$173,011	$680,567
Gift	$319,456	$454,958	$702,430	$527,482	$810,311	$1,184,684	$809,746	$996,887	$1,660,180
Other	$495,292	$444,386	$694,206	$368,961	$558,070	$606,715	$423,534	$460,477	$746,689

Table 4: Sponsored Project Funding by Recipient (Total $) FY2017 - FY2025								
FY	**CGRS[4]**	**Consortium[5]**	**C4i[6]**	**WLL[7] (Legacy)**	**WLL[8] (Successor)**	**EAC[9]**	**Others**	**Total**
2017	$1,182,748	$511,205	$200,129	$1,334,607	-	-	$25,913	**$3,254,603**
2018	$1,539,184	$397,619	$534,680	$754,296	-	-	$298,065	**$3,523,844**
2019	$2,231,190	$534,098	$292,601	$1,277,851	-	-	$457,291	**$4,793,032**
2020	$2,414,809	$1,007,683	$484,742	$804,168	-	-	$140,943	**$4,852,344**
2021	$2,420,004	$1,129,423	$1,105,909	$1,243,733	-	-	$452,005	**$6,351,074**
2022	$2,842,995	$3,655,056	$980,842	$1,414,089	-	-	$1,004,803	**$9,897,784**
2023	$2,441,867	$3,349,646	$886,356	$1,320,439	-	-	$1,130,515	**$9,128,823**
2024	$2,759,331	$1,466,787	$1,009,772	$1,164,576	-	-	$897,268	**$7,297,734**
2025	$4,010,855	$994,270	$1,415,073	-	$1,180,294	$1,090,359	$1,165,182	**$9,856,034**
Total	**$21,842,982**	**$13,045,787**	**$6,910,105**	**$9,313,760**	**$1,180,294**	**$1,090,359**	**$5,571,985**	**$58,955,271**
Avg	**$2,426,998**	**$1,449,532**	**$767,789**	**$1,164,220**	**$1,180,294**	**$1,090,359**	**$619,109**	**$6,550,586**

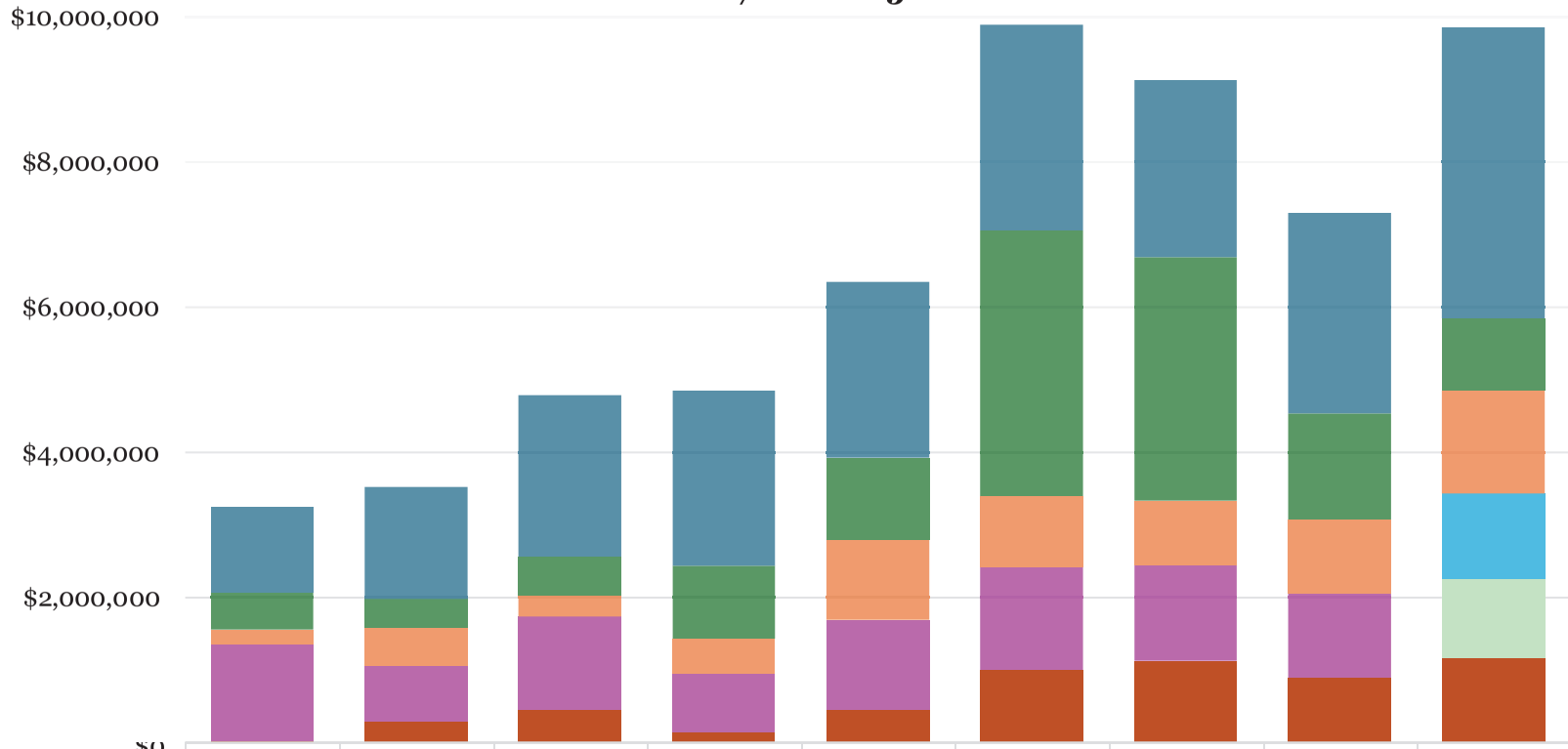
[4] The Center for Gender and Refugee Studies, led by Executive Director Karen Musalo.
[5] The UCSF/UC Law SF Consortium on Law, Science & Health Policy, led by Executive Director Sarah Hooper.
[6] The Center for Innovation, led by Director Robin Feldman.
[7] In FY2025, the Center for WorkLife Law (WLL) split into two separate centers – a "new" Center for WorkLife Law, led by co-Directors Elizabeth Morris and Jessica Lee, and Equality Action Center, led by Director Joan Williams. Accordingly, for purposes of this analysis, the center that existed from FY2017-FY2024 is referred to as "WLL (Legacy)" and the "new" Center for WorkLife Law formed in FY2025 is referred to as "WLL (Successor)".
[8] The Center for WorkLife Law, formed in FY2025 and led by co-Directors Elizabeth Morris and Jessica Lee.
[9] Equality Action Center, formed in FY2025 and led by Director Joan Williams.

Table 5: Sponsored Project Funding by Recipient (% of Total)
FY2017 - FY2025

FY	CGRS	Consortium	C4i	WLL (Legacy)	WLL (Successor)	EAC	Others	TOTAL[10]
2017	36.3%	15.7%	6.1%	41.0%	-	-	0.8%	**5.5%**
2018	43.7%	11.3%	15.2%	21.4%	-	-	8.5%	**6.0%**
2019	46.6%	11.1%	6.1%	26.7%	-	-	9.5%	**8.1%**
2020	49.8%	20.8%	10.0%	16.6%	-	-	2.9%	**8.2%**
2021	38.1%	17.8%	17.4%	19.6%	-	-	7.1%	**10.8%**
2022	28.7%	36.9%	9.9%	14.3%	-	-	10.2%	**16.8%**
2023	26.7%	36.7%	9.7%	14.5%	-	-	12.4%	**15.5%**
2024	37.8%	20.1%	13.8%	16.0%	-	-	12.3%	**12.4%**
2025	40.7%	10.1%	14.4%	-	12.0%	11.1%	11.8%	**16.7%**
% of Total[11]	**37.1%**	**22.1%**	**11.7%**	**15.8%**	**2.0%**	**1.8%**	**9.5%**	**100.0%**

[10] This column represents the percentage of total FY2017-FY2025 sponsored project funding recorded by all recipients combined in each FY.
[11] This row represents the total FY2017-FY2025 sponsored project funding recorded by each recipient as a percentage of total FY2017-FY2025 sponsored project funding recorded by all recipients.

Sponsored Project Funding by Recipient (Total $)
FY2017 - FY2025



	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025
CGRS	$1,182,748	$1,539,184	$2,231,190	$2,414,809	$2,420,004	$2,842,995	$2,441,867	$2,759,331	$4,010,855
Consortium	$511,205	$397,619	$534,098	$1,007,683	$1,129,423	$3,655,056	$3,349,646	$1,466,787	$994,270
C4i	$200,129	$534,680	$292,601	$484,742	$1,105,909	$980,842	$886,356	$1,009,772	$1,415,073
WLL (Legacy)	$1,334,607	$754,296	$1,277,851	$804,168	$1,243,733	$1,414,089	$1,320,439	$1,164,576	-
WLL (Successor)	-	-	-	-	-	-	-	-	$1,180,294
EAC	-	-	-	-	-	-	-	-	$1,090,35
Others	$25,913	$298,065	$457,291	$140,943	$452,005	$1,004,803	$1,130,515	$897,268	$1,165,182

Appendix B:
Methodology for Categorization of Sponsored Project Funding

I. 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 Law 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 is included within "Other Sources" for the purposes of this analysis.

Code 4105 ("WLL Services") is assigned to revenue exclusively allocated to the Center for WorkLife Law (WLL) in support of its activities and is included within "Other Sources" for the purposes of this analysis.[1]

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 and use of Code 4571 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.

[1] Use of Code 4105 was discontinued in FY2025.

Code 4352 ("Gifts") is assigned to revenue provided to the 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 is labelled as "Gifts" for the purposes of this analysis.

Code 4357 ("Non-Exchange Grants") is assigned to revenue provided to the Foundation 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 is 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 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 is included within "Gifts" for the purposes of this analysis.

II. 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 largest research centers from all other research centers and individual faculty into the following categories:

- Center for Gender & Refugee Studies (CGRS)
- UCSF/UC Law SF Consortium on Law, Science & Health Policy ("Consortium")
- Center for Innovation (C4i)
- Center for WorkLife Law, operating from FY2017-FY2024 ["WLL (Legacy)"][2]
- Center for WorkLife Law, formed in FY2025 ["WLL (Successor")]

[2] In FY2025, the Center for WorkLife Law (WLL) split into two separate centers – a "new" Center for WorkLife Law, led by co-Directors Elizabeth Morris and Jessica Lee, and Equality Action Center (EAC), led by Director Joan Williams. For purposes of this analysis, the center that operated from FY2017-FY2024 is referred to as "WLL (Legacy)" and the "new" Center for WorkLife Law formed in FY2025 is referred to as "WLL (Successor)", and each of those centers is treated separately from EAC.

- Equality Action Center (EAC)
- Other research/programmatic centers and individual faculty unaffiliated with specific research/programmatic centers (“Others”)

ACTION ITEM

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

2. SUBJECT: Core Operations – State Proposed Budget for 2025-26

3. RECOMMENDATION:

That the Board of Directors approve the attached state proposed budget for the fiscal year 2025-26.

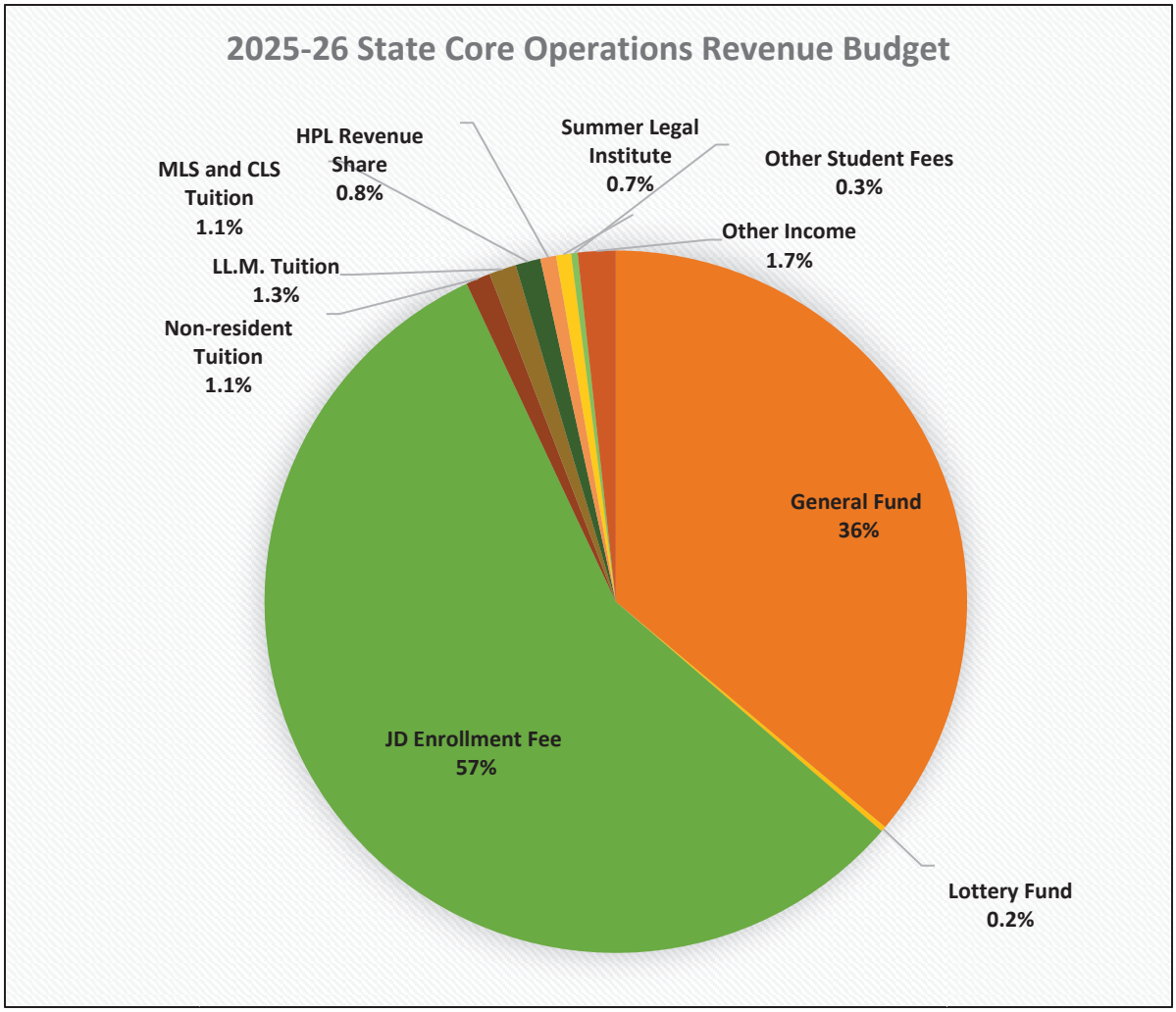
Overview

The proposed budget for fiscal year 2025–26 totals $96.8 million in revenues and $98.6 million in expenditures, resulting in an operating deficit of -$1.8 million (-1.9%). The deficit reflects the College's commitment to invest its resources in academic programs, financial aid, and institutional infrastructure. While the budget includes funding to maintain the 3% compensation pool for faculty and unrepresented staff, along with funding to fulfill contractual obligations for represented employees, resources are not budgeted to narrow compensation gaps with benchmark institutions or achieve other strategic objectives. Further, no funding is included for potential costs arising from collective bargaining with AFSCME or the UAW.

Fiscal details on significant elements of both the revenue and expense budgets for FY 2025-26 are presented below.

Revenues

Total projected revenues for 2025–26 are $96.8 million, representing a year-over-year increase of $9.2 million, or 11%, over 2024–25. The most significant portion of this revenue, $54.8 million or 57%, is expected to come from JD Enrollment Fees (including veteran fee waivers), followed by General Fund appropriations totaling $34.9 million or 36%. Additional revenue sources include nonresident tuition, tuition from LL.M., MLS, and CLS programs, the HPL Revenue Share, the Summer Legal Institute, minor contributions from other student fees, other miscellaneous income, and the State Lottery Fund.



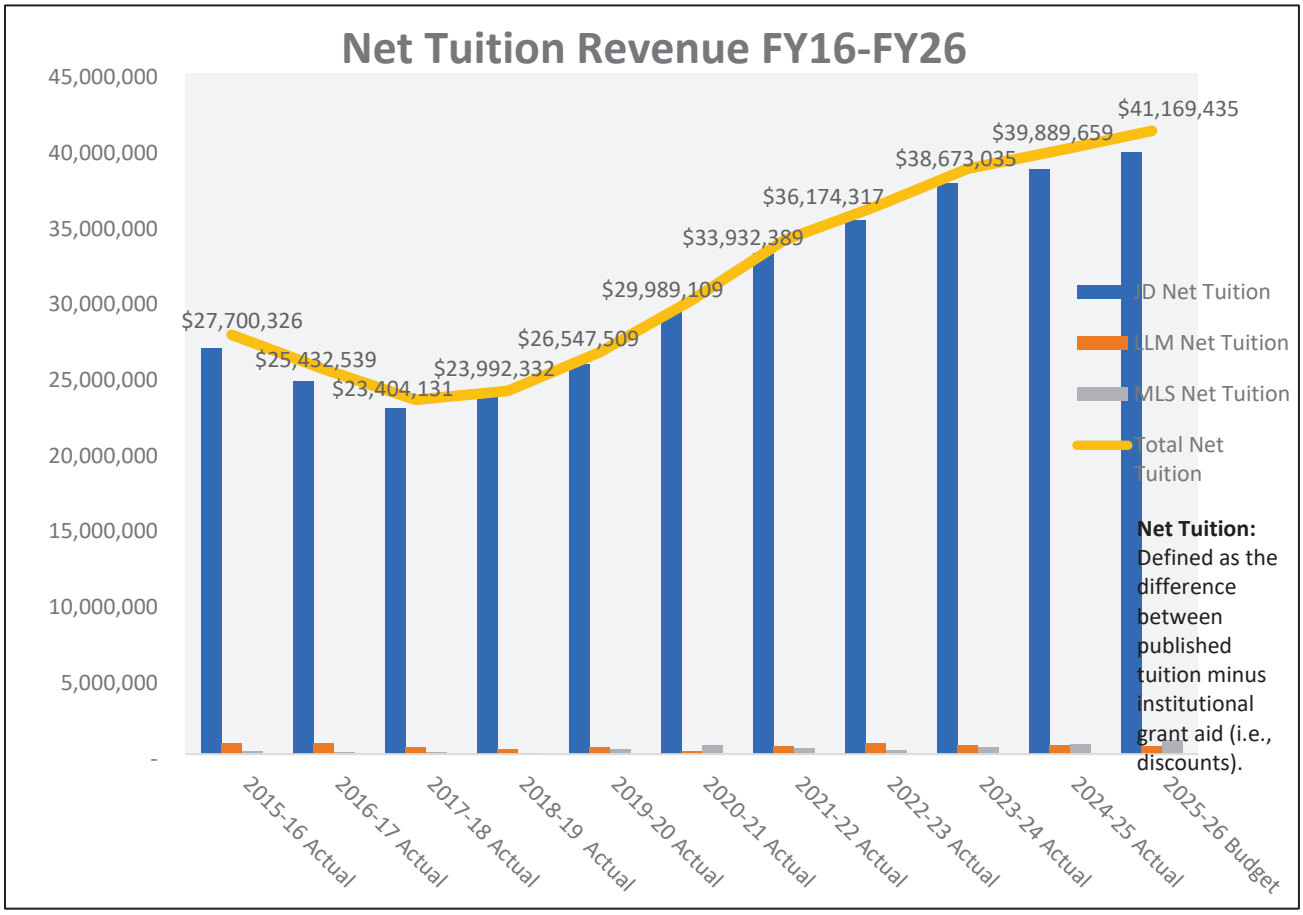
- **State Appropriations, General Fund -** General Fund support for core operations in California's Budget Act of 2025 is $24.1 million (exclusing the $10.1 million for McAllister Tower. The pass-through General Fund support for rental payments on lease-revenue bonds for the 333 Golden Gate building continues at the adjusted amount for the current state debt service schedule, with a 2025-26 appropriation of $3.1 million.

State of California Funding Appropriations

Description	2024-25	2025-26	$ Change	% Change
Ongoing General Fund Support	23,181,000	24,836,000	1,655,000	7.1%
100 McAllister Tower Building Capital Renovation Project Debt Service Support (BCP= 30 Years)		10,079,000	10,079,000	100.0%
State General Fund Operations	**$23,181,000**	**$34,915,000**	**$11,734,000**	**50.6%**
333 Golden Gate Rental Payments on Lease-revenue Bonds	3,092,000	3,090,000	(2,000)	-0.1%
Total State General Fund Appropriation	**$26,273,000**	**$38,005,000**	**$11,732,000**	**44.7%**

- **Tuition and Related Fees**
  Overall, tuition revenue increases by $4.1 million or 7%, with growth across most categories, although some items (e.g., Summer Legal Institute and MBE support fee) show minor decreases. As approved by the Board of Directors at the September 2024 meeting, the 2025-26 enrollment fee for the core JD program is $53,087, representing a 7.5% increase. The non-California resident tuition is $8,686, representing a 16% increase. The LL.M. fee increased by 15.8% to $55,000, and the MLS/CLS fee increased by 15.4% to $37,500 (full-time enrollment is 10 or more units at $1,875 per unit).

  Revenues are based on the following enrollment assumptions, and net tuition reflects a continuation of historical tuition discounting (average 30% for JD students). The changes in net tuition revenue and FTE student enrollment for JD, LLM, and MLS programs are displayed below.



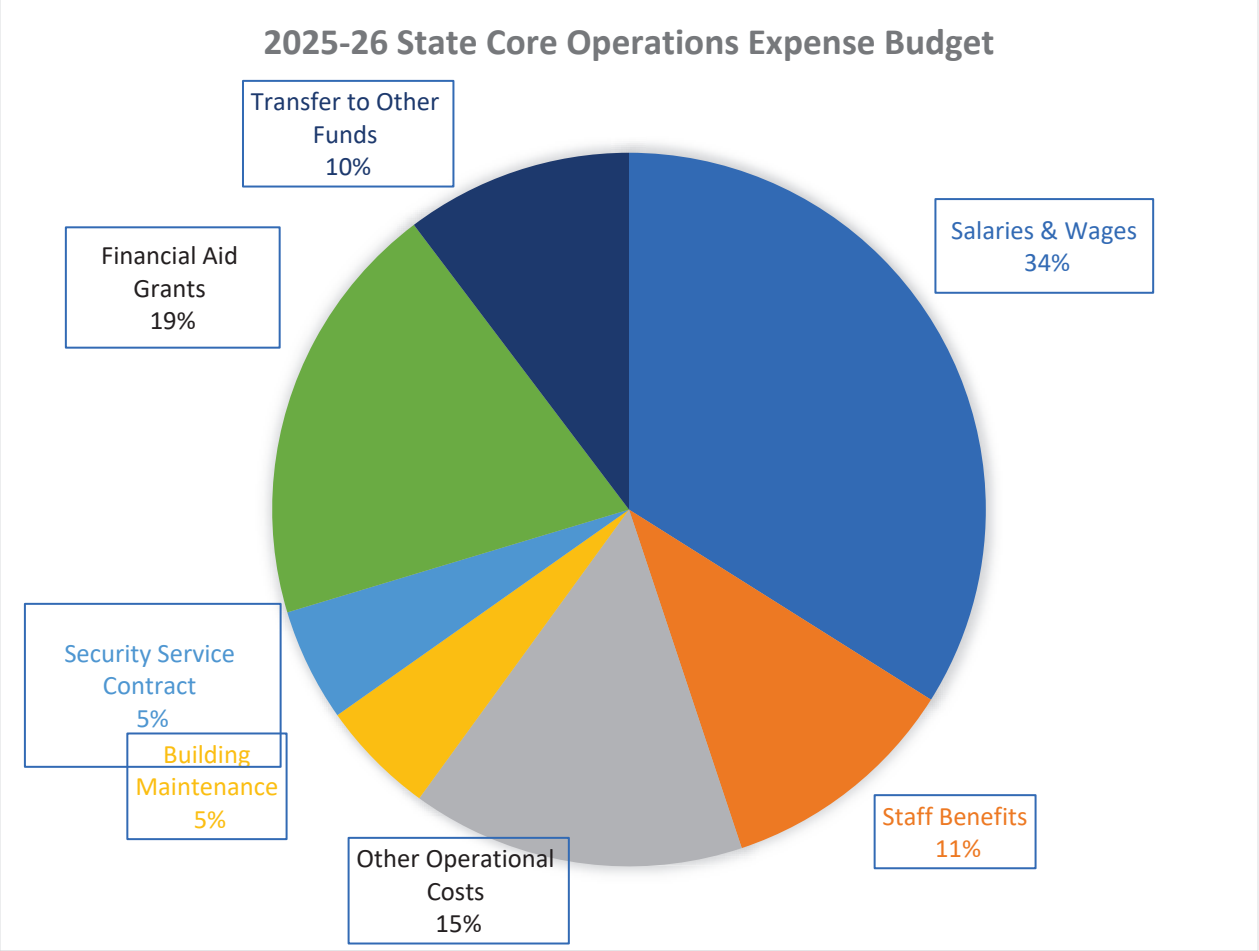
FTE Student Enrollment	Beginning Budget 2025-26	Actuals 2024-25	FTE Change	% Change
JD	1064.0	1069.8	-5.8	-0.5%
LL.M.	22.0	24.7	-2.7	-10.9%
MLS	29.0	23.0	6.0	26.1%
TOTAL	**1,115**	**1,118**	**-2.5**	**-0.2%**
Veteran Fee Waivers	-31.0	-31.5	0.5	-1.6%
Non-Resident Tuition	126	126.6	-0.6	-0.5%

- **JD Enrollment Fee**—Revenue is budgeted at $56.5 million, up $3.7 million or 7% from 2024-25, reflective of the 7.5% fee increase and a slight decrease of 0.5% in enrollment. 1,064 FTE JD students, including 390 1L students, are projected.
- **Non-resident Tuition**— The 2025-26 non-resident tuition is budgeted at $1.1 million, up $146,650 or 15% from 2024-25, reflective of a 16% fee increase and a slight decrease of 0.5% in enrollment. The 2025-26 budget assumes 126 FTE (11.8%) JD students paying non-resident tuition.
- **Veteran Fee Waivers**—The 2025-26 budget projects 31 FTE JD students are veterans eligible for a waiver of the $53,087 enrollment fee, for a total of $1.6 million in foregone fee revenues resulting from this unfunded state mandate. In 2024-25, 31.5 FTE JD students received waivers for foregone revenues of $1.6 million.
- **LL.M. Tuition**—Revenue is budgeted at $1.2 million, up 3% from 2024-25, indicating an approved 15.8% fee increase and a 10.9% (2.7 FTE) decrease in enrollment.
- **MLS and CLS Tuition**—Part-time students are enrolled in the MLS and CLS programs, with a projected enrollment of 29.7 FTE students in 2025-26. $1.1 million in fee revenue is projected, an increase of $340,228 (44%) from 2024-25, reflective of a 15.4% fee increase and a 25% (6 FTE) increase in enrollment.
- **HPL Revenue Share**—The online Master in Health Policy and Law (HPL) degree program restarted enrollment in 2022-23. The 2025-26 budget reflects 23 FTE students for a total of $1.1 million in fees collected by UC Law SF before paying UCSF's revenue share of $373,513, which results in a net revenue projection of $0.7 million, a 1.3% increase from the actual net revenue share in 2024-25.
- **Unrealized Gain/Loss on Investments**—This category accounts for the change in the state fund's share market value in the UC General Endowment Pool (GEP). It is not a budgeted item, as there is no basis for projection.
- **Miscellaneous Income**—Revenue decreased by $149,342 or 72% from 2024-25, mainly due to the one-time $140,370 cost recovery related to the College's name change litigation from United Educators.

- **Transfer from Other Funds**—The 2025-26 budget drops to $0 because the one-time non-mandatory transfers incurred in 2024-25 are not expected in 2025-26.

Expenses

The total proposed expenses for FY 2025–26 are $98.6 million, representing a $16.7 million or 20% increase from the FY 2024–25 preliminary year-end actual of $81.9 million. Most of the increase is for the $10.1 million ongoing General Fund, which shall be allocated to support debt service associated with the McAllister Tower building capital renovation project by transferring funds to the non-state capital fund. Personnel-related costs remain the most significant budget component, accounting for 45% of the total expenses budget, demonstrating UC Law's continued investment in its workforce to support core operations and instruction.



Key expenditure changes include:

- **Salaries and Wages**—Budgeted at $32.7 million, up $1.7 million or 6% from FY 2024-25 preliminary year-end actuals, driven by anticipated cost-of-living adjustments and faculty step increases. The 2025-26 budget reflects the full-year salary cost of 2024-25, as well as

adjustments that include general salary increases effective January 1, 2026, and union compensation increases effective the same date. Here are significant details of the 2025-26 salary budget components:

1. **Faculty Changes**: The faculty salary budget of $16.4 million accounts for changes from faculty retirements, new hires, step changes, and changes to visiting professors, stipends, and adjunct appointments. This represents an increase of $1.3 million from the 2024-25 preliminary actual faculty salaries. The proposed faculty budget provides for the following in 2025-26:
    a) Recruitment of ladder-rank faculty: One Associate Professor of Law was hired at step 1 to backfill the faculty position that had retired in June 2024. Three Professor of Law were elevated to the rank of Distinguished Professor.
    b) Recruitment of Clinical Faculty and Lecturer: One lecturer is expected to retire on July 31, and a replacement was hired in April 2025. One Lecturer position was increased from part-time to full-time.
    c) An allocation of $1.4 million for Adjunct, Sullivan, and Emeriti Professor wages; an allocation of $677,855 for Visiting Professors; and an allocation of $393,048 for Summer Research stipends, with an increase of $100,000 to the state-funded summer stipend base.
    d) A faculty compensation adjustment pool, effective January 1, 2026, equivalent to 3% of regular base salaries, to fund general salary adjustments at a projected cost of $170,805 ($207,784 inclusive of benefits).
    e) A provisional allocation of $236,716 is available to fund faculty salary changes or other academic program needs through June 2026.
    f) A provisional allocation of $431,521 is available to fund two vacant faculty lines, which are expected to be filled in the short term.
    g) One-time savings from partial buyouts of state salaries through nonstate grants and chair funding.
2. **Staffing changes:**
    a) Newly established staff positions and major reclassifications:
        - Chief Technology Officer—Information Technology. This position is being reclassified from an existing vacant Assistant Director position, with a proposed salary budget of $185,000 for the 2025-26 fiscal year.
        - Chief Information Security Officer—Information Technology. A new FTE with a proposed salary budget of $185,000, pending refinement of position description and hiring timing. This senior-level IT leadership position is responsible for overseeing the enterprise cybersecurity program and providing strategic leadership in IT governance.
        - Personnel Analyst—Human Resources. This position is being reclassified from an existing vacant Senior Administrative Analyst position, with a proposed annual salary of $70,219 starting in August 2025.

- Director of the First Generation Program. This 0.25 FTE contract position is being reclassified from an existing vacant position, with a proposed stipend of $25,000.

b) General salary adjustments for represented staff—an allocation providing funding equivalent to a 3% salary increase effective January 1, 2026, for AFSCME represented staff. A 3.5% salary increase effective January 1, 2026, for AFT librarians is budgeted according to the new agreement. The contract with AFSCME expired on June 30, 2024 and a new contract is under negotiation.

c) A compensation funding pool for non-represented and policy-covered career staff salary adjustments effective January 1, 2026, equivalent to 3% of base salaries, is projected at $131,213 ($159,621 inclusive of benefits).

d) Projected staff salary savings at 2% or $(286,268) from turnover and temporary vacancies.

e) $75,000 salary budget pool for staff reclassification/equity adjustments is included.

- **Staff Benefits**—The benefits structure helps ensure the retention and well-being of the workforce. It is closely tied to personnel costs, which include retirement, health insurance, and other employee benefits. The continuation of the multi-rate benefit structure facilitated by the implementation of UCPath is budgeted for 2025-26. Calculated as a percentage of salaries by employee group, all benefits (health and welfare, UCRP, OPEB, workers' compensation, and unemployment insurance) are allocated to cost centers based on the combined benefit rates. Premium cost changes to health and welfare plans managed by UC will take effect on January 1, 2026.

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

- **Insurance**—The 2025-26 budget is projected at $1.2 million, which has increased by $294,189 or 34% from the 2024-25 preliminary actuals, with a 7% increase on total projected premiums primarily attributable to the cost reassignment of excess commercial, commercial package, and pollution insurance premium costs to Core Operations from non-state auxiliary enterprises.
- **Travel**—Included are allocations for faculty research and professional development from which transfers from other expenditure categories are allowed. $206,300 has been budgeted for faculty research accounts. The 2025-26 budget includes significant allocations for student competition team travel ($250,000), academic research, Admissions travel, and departmental staff travel for professional development activities (conferences and seminars).
- **Computer Software**—This supports licensing and maintenance of key software platforms used in academic, administrative, and student services functions. The 2025-26 budget is projected at $1.5 million, representing a 70% increase of $630,725 from the 2024-25

preliminary actuals, due to higher prices and additional software needs. $303,720 of the increase is approved for ongoing special funding requests for new cybersecurity software, Darktrace, Centegix 9-1-1 Panic Button Alert System, and a license of "Instrumentl" Grant Fundraising and Management Platform. $65,034 is allocated for the new Enrollment RX MLS Application Form Builder and Colleague Integration software. $616,492 of the budget is assigned to the IT department, $230,253 to the Fiscal Services department, and $95,000 to the Office of the Registrar.

- **Building Maintenance—**This allocation supports preventative maintenance, repairs, and engineering to the physical campus infrastructure. The 2025-26 budget of $5.1 million represents a $629,215 increase, or 14%, over the 2024-25 preliminary actuals. $101,108 of the budget increase is for Janitorial Services, and $462,337 is for engineering costs due to a contracted rate increase for labor, benefits, and contingency. Most building maintenance projections are allocated to janitorial services at $1.9 million and engineering at $2.5 million.
- **Security Service Contract**—This budget maintains contracted security services, ensuring campus safety and emergency preparedness. The 2025-26 budget is projected at $5 million, and $3.2 million is for public safety services provided by Urban Alchemy. It is $298,123, or 6% less than the 2024-25 preliminary actuals, primarily due to a 4% savings achieved through a direct contract with Urban Alchemy, services for which had previously been provided through the Mid-Market Foundation.
- **Utilities**—The 2025-26 budget of $1.3 million represents a $152,105 increase, or 13%, over the 2024-25 preliminary actuals due to increased usage and higher energy costs. The $106,990 increase is attributed to electricity costs. The total budget includes a projection of $0.9 million for electricity and $168,000 for steam.
- **Space & Equipment Rental** - The 2025-26 budget decreased by $568,254 or 17%. This is primarily due to the office spaces located in the 198 McAllister building having been relocated to the 200 McAllister building, and no further office rent payments at $710,626 are expected in 2025-26. $2.5 million of space and equipment rental projections are allocated to Academic space rental at the 198 McAllister building.
- **Financial Aid Grants**—The second-largest budget category, financial aid funding plays a critical role in ensuring access and affordability for students. The financial aid budget for the 2025-26 fiscal year totals $18.9 million, representing $4.1 million, or 27%, more than the actual expenditures for the 2024-25 fiscal year. $16.7 million of the total budget is for the JD program grants at a discount rate of 29.6%. $1.3 million of the increase is allocated for a housing stipend at $250/month for new UC Law students residing at the 198 McAllister building. $2.5 million of the increase is allocated for JD grants due to a higher JD enrollment fee and more 1L JD students with a higher discount rate of 33% are projected. Additional student financial aid expenses are included in nonstate budgets.
- **Transfer to Other Funds**—The 2025-26 budget of $10.1 million is for the ongoing General Fund, which shall be allocated to support debt service associated with the McAllister Tower building capital renovation project by transferring funds to a capital fund.

Summary

The College did not achieve targeted levels of savings as detailed in the Cost & Budget Restructuring Plan approved by the Board of Directors in 2024-25. While the 2025–26 proposed budget incorporates all of the revenue enhancements contained in the plan buttressed by better-than-expected outcomes in state funding militated for fewer layoffs than originally planned, strategic realignment remains a necessity if the College is to be successful at narrowing gaps in key metric (e.g., faculty and non-represented compensation, etc.) and to increase resiliency in the light of federal uncertainty. Resources need to be identified to fund targeted investments in workforce, infrastructure, and student success.

Based on the projected revenues identified and assuming approval of all proposed expenditures, the net change in assets is projected at -$1.8 million (-1.9%). The ending operating reserves are projected at $36.5 million. Included in the carryover is $0.2 million of the $3.5 million state funding received in 2021-22 for the California Institute of Law, Neuroscience, and Education.

SUMMARY - OPERATIONS	Proposed Budget 2025-26	Dollar Change FY26 Budget to FY25 Preliminary Year-end Actual	% Change from FY26 Budget to FY25 Preliminary Year-end Actual	Preliminary Year-end Actual 2024-25	Year-end Actual 2023-24
Operating Revenues (without Gains/Losses)	96,778,780	15,355,923	18.9%	81,422,857	79,980,291
Operating Expense (without Financial Aid)	(79,650,359)	(12,967,312)	19.4%	(66,683,047)	(61,503,584)
Operating Income (Loss)	**$17,128,421**	**$ 2,388,611**	**16.2%**	**$14,739,810**	**$18,476,707**
Financial Aid Grants	(18,941,369)	(4,072,478)	27.4%	(14,868,892)	(14,492,255)
Net Change includes Financial Aid	**$ (1,812,948)**	**$ (1,683,866)**	**1304.5%**	**$ (129,082)**	**$ 3,984,452**
Realized/Unrealized Gains (Losses)	-	(6,147,789)	-100.0%	6,147,789	5,076,627
Change in Net Assets	**$ (1,812,948)**	**$ (7,831,655)**	**-130.1%**	**$ 6,018,707**	**$ 9,061,079**
Beginning Net Assets - Operating (Preliminary)	38,301,690	6,018,707	18.6%	32,282,983	25,899,200
Projected Ending Reserves - Operating	**$36,488,742**	**$ (1,812,948)**	**-4.7%**	**$38,301,690**	**$34,960,279**

Beginning Net Assets – Operating (Preliminary)
The carryover of the prior year's net assets was a preliminary balance of $38.3 million. This is the net amount of state fund assets minus liabilities, excluding non-cash pension accounts (i.e., deferred outflows/inflows of resources, net pension, and retiree health benefits liabilities with UCRP).

Plant Fund Reserve
The State Plant Fund Reserve ended 2024-25 with a preliminary ending balance of $7.4 million, an increase of $1.3 million from investment activities.

Lease-Revenue Bond Rental Payments

The State Budget Act of 2025 includes $3,090,000 in General Fund capital item 6600-093-0001 for support of UC Law SF. This is the scheduled rental payment for the 333 Golden Gate building, funded by lease-revenue bonds through the State of California. This is 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

A total of $9 million in funding 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. Funding provides full-fee scholarships and living expenses for eligible students. The 2025-26 budget for student scholarships is $743,290, resulting in a projected ending fund balance of $5 million.

Attachments:

- State Core Operations - Proposed Budget for 2025-26

STATE BUDGET - 2025-26 Proposed

REVENUES	Proposed Budget 2025-26		Dollar Change FY26 Budget to FY25 Preliminary Year-end Actual	% Change from FY26 Budget to FY25 Preliminary Year-end Actual	Preliminary Year-end Actual 2024-25	Year-end Actual 2023-24
State Appropriations						
General Fund	34,915,000	*	11,734,000	51%	23,181,000	23,956,000
Lottery Fund	231,000		9,531	4%	221,469	256,987
Subtotal	**$ 35,146,000**		**$ 11,743,531**	**50%**	**$ 23,402,469**	**$ 24,212,987**
Tuition and Related Fees						
JD Enrollment Fee	56,484,568	*	3,652,620	7%	52,831,948	51,454,587
Non-resident Tuition	1,094,436	*	146,650	15%	947,786	767,382
Veteran Fee Waivers	(1,645,697)	*	(89,656)	6%	(1,556,041)	(1,529,569)
LL.M. Tuition	1,210,000	*	35,534	3%	1,174,466	1,198,408
MLS and CLS Tuition	1,111,875	*	340,228	44%	771,648	503,750
HPL Revenue Share	743,969	*	9,297	1%	734,672	646,314
Summer Legal Institute	669,136		(16,482)	-2%	685,618	631,355
MBE Support Fee	133,770		(1,110)	-1%	134,880	139,560
Other Student Fees	151,360		(326)	0%	151,686	180,300
Subtotal	**$ 59,953,417**		**$ 4,076,755**	**7%**	**$ 55,876,662**	**$ 53,992,088**
Scholarly Publications						
Subscription Revenues	34,394		5,469	19%	28,925	38,130
Subtotal	**$ 34,394**		**$ 5,469**	**19%**	**$ 28,925**	**$ 38,130**
Other Income						
Investment Income	600,000		(9,015)	-1%	609,015	672,737
Realized Gain/Loss on Sale of Investments	-		-	-100%	3,469	-
Unrealized Gain/Loss on Investments	-	*	(6,144,320)	-100%	6,144,320	5,076,627
Overhead Allowances	986,769		(25,488)	-3%	1,012,257	880,534
Miscellaneous Income	58,200	*	(149,342)	-72%	207,542	116,775
Subtotal	**$ 1,644,969**		**$ (6,331,634)**	**-79%**	**$ 7,976,603**	**$ 6,746,673**
Transfer from Other Funds	**$ -**	*	**$ (285,986)**	**-100%**	**$ 285,986**	**$ 67,040**
TOTAL REVENUES	**$ 96,778,780**		**$ 9,208,135**	**11%**	**$ 87,570,645**	**$ 85,056,918**

*See attached narrative.

EXPENSES	Proposed Budget 2025-26		Dollar Change FY26 Budget to FY25 Preliminary Year-end Actual	% Change from FY26 Budget to FY25 Preliminary Year-end Actual	Preliminary Year-end Actual 2024-25	Year-end Actual 2023-24
Salaries & Wages	32,658,452	*	1,714,755	6%	30,943,697	29,554,372
Student Wages-Reg. & Work-study	744,699		122,068	20%	622,631	710,340
Staff Benefits	10,783,006	*	214,430	2%	10,568,576	6,986,748
Consultants	635,749		21,771	4%	613,978	594,309
Employee Development & Testing	132,880		5,205	4%	127,675	152,096
Recruiting & Advertising	427,440		(84,340)	-16%	511,780	368,634
Audit, Legal, and Case Costs	404,790		46,991	13%	357,799	292,437
Insurance	1,168,663	*	294,189	34%	874,474	803,331
Printing & Copier Service	297,383		23,061	8%	274,322	272,671
Supplies	380,275		9,855	3%	370,420	387,223
Travel	861,163	*	182,290	27%	678,873	753,134
Memberships & Subscriptions	366,751		(2,803)	-1%	369,554	331,384
Events & Entertainment	708,347		23,322	3%	685,025	641,340
Computer Software	1,535,337	*	630,725	70%	904,612	955,528
Data Processing	474,775		8,704	2%	466,071	425,123
Electronic Databases & Bibliography Svs	594,150		31,399	6%	562,751	554,803
Books & Bindings	526,069		(58,289)	-10%	584,358	602,785
Equipment Maintenance	166,154		(26,413)	-14%	192,567	149,815
Building Maintenance	5,117,590	*	629,215	14%	4,488,375	4,207,395
Security Service Contract	5,010,000	*	(298,123)	-6%	5,308,123	4,375,587
Other Contract Services	2,107,456		123,076	6%	1,984,380	2,034,523
Utilities	1,310,417	*	152,105	13%	1,158,312	1,209,912
Equipment & Improvements	214,392		44,653	26%	169,739	383,768
Space & Equipment Rental	2,694,489	*	(568,254)	-17%	3,262,743	3,091,705
Miscellaneous Expense	250,932		(24,245)	-9%	275,177	393,811
Financial Aid Grants	18,941,369	*	4,072,478	27%	14,868,892	14,492,255
Transfer to Other Funds	10,079,000	*	9,751,964	2982%	327,036	1,270,812
TOTAL EXPENSES	**$ 98,591,728**		**$ 17,039,790**	**21%**	**$ 81,551,938**	**$ 75,995,839**

*See attached narrative.

SUMMARY - OPERATIONS	Proposed Budget 2025-26	Dollar Change FY26 Budget to FY25 Preliminary Year-end Actual	% Change from FY26 Budget to FY25 Preliminary Year-end Actual	Preliminary Year-end Actual 2024-25	Year-end Actual 2023-24
Operating Revenues (without Gains/Losses)	96,778,780	15,355,923	18.9%	81,422,857	79,980,291
Operating Expense (without Financial Aid)	(79,650,359)	(12,967,312)	19.4%	(66,683,047)	(61,503,584)
Operating Income (Loss)	**$ 17,128,421**	**$ 2,388,611**	**16.2%**	**$ 14,739,810**	**$ 18,476,707**
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*See attached narrative.

ACTION ITEM

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

2. SUBJECT: Student Fee Increases for 2026-27
General Enrollment Fee - Resident and Nonresident

3. RECOMMENDATION:

That the Board of Directors approves the following fees for the 2026-27 academic year:

A. General Enrollment Fee of $54,680 representing an increase of $1,593 (3%)
B. Nonresident Tuition of $9,555 representing an increase of $869 (10%)

4. BACKGROUND:

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

Student fees are the primary source of revenue supporting the College's educational mission. State appropriations are also a major revenue source and helped offset the adverse revenue impact of the General Enrollment Fee being flat from 2012-13 through 2021-22. After this ten-year period of fee stability, increases were necessary to assure resources were available to maintain a high-quality academic program. These are summarized below:

- 2022-23: 3% increase
- 2023-24: 5% increase
- 2024-25: 5% increase
- 2025-26: 7.5% increase

Major Cost Factors for 2026-27

UC Law SF continues to confront fiscal challenges comparable to law schools and state and local agencies throughout the State of California. Looking to the future, state funding levels are uncertain as California grapples with a multibillion-dollar deficit that is projected to go into 2026-27.

- Faculty compensation – Over the last decade, UC Law SF has slipped in adequately investing in its faculty as evidenced by differentials between pay scales and other compensation measures when compared to the UC system. In recent years, salary savings from faculty turnover have been realized and now most ladder-rank positions are filled; the College's faculty hiring plan still requires significant additional funding increases.

- Non-represented staff compensation – Similarly, investment in supporting the College's non-represented employees is an important institutional objective. The need to remain salary competitive is evidenced by difficulties in filling vacant positions and turnover.

- Represented staff – Bargaining for successor agreements between UC Law SF and unions representing staff and librarians commenced in the 2023-24 fiscal year. The AFSCME agreement expired on June 30, 2024, and negotiations are ongoing. A new contract was recently signed with AFT-Librarians and added costs have been incurred. Similarly, negotiations are ongoing with the UAW who represent on-campus student workers.

- Inflation – As noted later in this analysis, inflation continues to put financial stress on the College.

- Operating Budget Cost Items—Various factors are contributing to the need to increase student fees for the upcoming year.

    - Information Technology – Cost containment efforts have limited necessary investments in IT infrastructure. Needs include significant resources over the next 3-4 years to upgrade the current Ellucian Colleague operating system, the ERP software used by Fiscal Services, Purchasing, the Registrar's Office, Financial Aid, and Grants. Additional funds are needed to upgrade the classroom control system touch panels and restore their functionality, as they can no longer support Zoom room functionality and are now seven years old. Furthermore, funds are required to enhance the College's cybersecurity defenses with dedicated staff, upgrade firewalls, and address other critical IT infrastructure support needs.
    - Safety and Security—The State of California funded sidewalk safety services at $1 million annually from a one-time $3 million appropriation in the Budget Act of 2023, which will be fully depleted in 2025-26. This cost will now be entirely borne by UC Law in 2026-27 as safety continues to be a priority. The projected security services cost is $5 million in 2025-26 and is expected to recur at a slightly higher price in 2026-27.
    - Employee Compensation—The continuation of a 3% compensation adjustment pool for career faculty and staff, effective January 1, 2027, is estimated to cost $1.07 million in salaries and benefits in 2026-27 (including union-represented staff).

Academic Year 2025-26: Current-year Fee Structure

The current-year (2025-26) fee structure at UC Law SF consists of the following charges and assessments.

- General Enrollment Fee – The General Enrollment Fee represents the primary fee at UC Law SF and is its main revenue source. This fee is analogous to the Tuition Fee, Student

Services Fee, and Professional Degree Supplemental Tuition Fee (i.e., mandatory system-wide fees) charged by the University of California. The General Enrollment Fee is currently $53,087.

- Nonresident Tuition – The establishment of nonresident tuition is based on state policy guidelines developed by the California Postsecondary Education Commission (CPEC). Students typically achieve residency status after their first year of attendance. Nonresident tuition is currently $8,686.

- Health Services Fee—UC Law SF operated a health clinic until 2020. For the current year, student primary care services will be provided by Carbon Health. Consistent with the policy adopted by the Board, healthcare services are required to be self-supporting. This fee provides the revenue necessary to fund all direct costs, including support staff and a student care advocate. The Health Services Fee is $965.

- Activity Fee and MBE Support Fee—Mandatory fees are charged to support student-related functions. These fees include the $157 Student Activity fee and the $120 Multi-State Bar Exam preparation fee, which are used to provide each student with bar preparation software.

- UCSHIP Accident and Sickness Insurance Plan – UC Law SF participates in the UC Graduate SHIP managed by the University of California. This allows students and their spouses and/or children to purchase health coverage at competitive rates by achieving economies of scale by virtue of the program's system-wide character. For 2025-26, the premium and program fee is $6,834. This fee is waivable upon presentation of proof of alternative equivalent coverage.

For 2025-26, total mandatory resident fees (inclusive of campus fees) are $61,163. Nonresidents pay an additional $8,686, for a total of $69,849. These figures include UCSHIP health insurance, as these premiums are waivable.

Law School Fees for the JD program assessed at other comparable law schools

For 2025-26, UC Law SF fees are lower than the average charged by other UC law schools; the average resident fee for four of the UC law schools listed below is $65,908, UC Law SF's fee is -7% lower. Similarly, UC Law SF nonresident tuition is lower than the average nonresident fee charged by UC, an -11% differential. The differential is largely driven by the impact on fees of the 10-year hiatus on fee increases between 2012-13 and 2021-22. The summarized data is shown below:

UC Law Schools - JD Student Fees for 2025-26
Current Fees: 2025-26

	Resident	Nonresident
UC Law SF	$ 61,163	$ 69,849
UC Davis	$ 63,964	$ 76,209
UC Irvine	$ 62,788	$ 75,033
UCLA	$ 62,788	$ 75,033
UC Berkeley	$ 74,093	$ 87,711

More granular detail is provided in the table below that displays fees by category for resident and nonresident students. Please note that this data shows current year (2025-26) fees and includes campus-based fees and student health insurance premiums.

	UCLA		UC-Davis		Berkeley		Irvine		UC Law SF: 2024-25		UC Law SF: 2025-26	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
FEES												
General Enrollment Fee	2,614	2,614	-	-	-	-	-	-	49,383	49,383	53,087	53,087
Prof. Degree Supplemental Tuition	11,871	12,663	42,310	42,310	49,392	50,764	41,670	41,670	-	-	-	-
Student Services Fee (Reg. Fee)	1,254	1,254	1,254	1,254	1,290	1,290	1,206	1,206	-	-	-	-
Tuition (Educational Fee)	56,518	56,518	12,762	12,762	13,140	13,140	12,264	12,264	-	-	-	-
Nonresident Tuition	-	12,245	-	12,245	-	12,246	-	12,245	-	7,488	-	8,686
Total	**$ 72,257**	**$ 85,294**	**$ 56,326**	**$ 68,571**	**$ 63,822**	**$ 77,440**	**$ 55,140**	**$ 67,385**	**$ 49,383**	**$ 56,871**	**$ 53,087**	**$ 61,773**
CAMPUS FEES	2,336	2,336	1,378	1,378	3,829	3,829	811	811	1,242	1,242	1,242	1,242
HEALTH INSURANCE	6,632	6,632	7,446	7,446	6,442	6,442	6,847	6,847	6,590	6,590	6,834	6,834
TOTAL FEES	**$ 81,225**	**$ 94,262**	**$ 65,150**	**$ 77,395**	**$ 74,093**	**$ 87,711**	**$ 62,798**	**$ 75,043**	**$ 57,215**	**$ 64,703**	**$ 61,163**	**$ 69,849**

Notes:
1. Health Insurance premiums are waivable upon presentation of proof of alternative, comparable coverage.
2. UC Law's General Enrollment Fee is analogous to mandatory system-wide fees at other UC campuses consisting of the Student Services Fee (formerly Registration Fee), Tuition (formerly Educational Fee), and Professional Degree Supplemental Tuition.

JD Fee Summary – Proposed UC Law SF 2026-27 to Current 2025-2026 UC Fees

For UC Law SF, the application of a 3% increase for the General Enrollment Fee for 2026-27 will bring that fee to $54,680 (or $1,593 increase per JD student). Even with this escalation, UC Law SF's fees will remain the lowest in the UC system with a fee for next year 6% below average UC charges in the current year. Similarly, nonresident tuition will be 9% below the UC average after the 10% increase. To assist with this comparison, it should be noted that fee growth at the other UC law schools typically increases between 4-5% annually.

UC Law Schools - Fee Comparison

	2025-26 Mandatory System-wide Resident Fees	2026-27 Projected UC Law SF Resident Fees	% Change (Proj.)
UC Berkeley	63,822	54,680	-14.3%
UC Davis	56,326	54,680	-2.9%
UC Irvine	55,140	54,680	-0.8%
UCLA	72,257	54,680	-24.3%
Average	$ 61,886	$ 54,680	-11.6%

	2025-26	2026-27	%
UC Law SF	$ 53,087	54,680	3.0%

UC Law SF will continue to provide a high-quality legal education at the lowest possible cost to minimize financial barriers to access and limit student debt burdens to the greatest extent possible.

Other Benchmark Law Schools

The following table summarizes the total fees charged in 2025-26 by national public and private law schools.

	Tuition & Fees	Nonresident
Boston College	$ 72,755.00	N/A
George Washington	$ 75,420.00	N/A
University of Michigan	$ 72,974.00	$ 75,974.00
University of Washington	$ 47,073.00	$ 58,926.00
University of Texas at Austin	$ 38,236.00	$ 56,822.00
University of Minnesota	$ 51,440.00	$ 61,844.00

*Excludes health insurance.

California private institutions are summarized below:

		Tuition & Fees
University of San Diego	$	66,950.00
Pepperdine	$	72,920.00
Loyola Marymount	$	70,360.00
University of San Francisco	$	59,800.00
California Western School of Law	$	64,720.00
USC	$	84,034.00
Santa Clara University	$	63,280.00

*Excludes health insurance.

Information regarding the inflation or deflation reflected in CPI

Inflationary pressures in the general economy are significant and projected to continue. The Department of Finance regularly publishes data measuring price changes. The Consumer Price Index for Urban Consumers (CPI-U) for California for the period ending on June 30, 2024, was 3%, and in the current year (the period ending June 30, 2025), an additional 2.5% increase is predicted. For 2026-27 and 2027-28, the Department of Finance projects an additional 3.3% and 3.4% respectively.

Nonresident Tuition

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

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

The proposed Nonresident Tuition for 2026-27 conforms to the provision that nonresident fees be adjusted based on two considerations: fees charged at benchmark institutions and cost recovery.

SUMMARY

- **JD Program**

Based on these considerations, the following fee structure is proposed for 2026-27:

	Authorized 2025-26	Propossed 2026-27	Change	Percent
General Enrollment Fee	53,087	54,680	1,593	3.0%
Nonresident Tuition	8,686	9,555	869	10.0%
Health Services Fee*	965	965	-	0.0%
Activity Fee*	157	157	-	0.0%
MBE Support Fee	120	120	-	0.0%
UCSHIP Insurance Premium*	6,834	6,834	-	0.0%
Total Resident	$ 61,163	$ 62,756	$ 1,593	2.6%
Total Nonresident	$ 69,849	$ 72,311	$ 2,462	3.5%

The General Enrollment Fee increase will result in $1.69 million in gross revenue, assuming 1,064 FTE JD students. The added surcharge for nonresident students will generate $109,494, assuming 126 FTE nonresident JD students. Of the revenue derived from the General Enrollment Fee increase, one-third ($0.56 million) is earmarked for need- and merit-based financial aid to mitigate any adverse impact on accessibility. After this set-aside, net revenue of $1.24 million will be available to support the College's priorities.

5. PROPOSED RESOLUTION*:

RESOLVED, that the Board of Directors approves the fees outlined below for the 2026-27 academic year:

a. General Enrollment Fee of $54,680 representing an increase of $1,593 (3%)
b. Nonresident Tuition of $9,555 representing an increase of $869 (10%)

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

ACTION ITEM

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

2. SUBJECT: Non-State Budget for 2025-26

3. RECOMMENDATION

That the Board of Directors approves the attached non-state proposed budget for the fiscal year 2025-26.

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

- Restricted Funds
- Unrestricted Funds

RESTRICTED FUNDS

This report includes all non-state current-use funds with restrictions imposed by external sources, such as donors or granting agencies. This is a function of expending grant and gift funds received and spending plans that use accumulated current-use fund balances.

Overview

The proposed FY 2025-26 restricted funds budget projects a net decrease in net assets of $2.7 million, compared to a net increase of $0.7 million in the FY 2024-25 preliminary year-end actuals. This $3.4 million change is driven by lower anticipated operating revenues from grants and contracts, modest growth in operating expenses, and lower nonoperating revenues due to the absence of one-time donations and investment gains realized in FY 2024-25. The planned deficit reflects an intentional drawdown of prior-year balances to support program activities.

Operating Revenues

Total operating revenues for FY 2025-26 are budgeted at $7 million, a decrease of $713,838 (9%) from the preliminary actual for FY 2024-25.

- **Grants and Contracts** – The 2025-26 proposed budget is $6.9 million, a $729,360 (-10%) decrease from prior year actuals, reflecting the conclusion of certain large grants and a more conservative outlook on new awards. It includes support for Research Center projects and general support (exchange and non-exchange grants):
  - $1 million in federal grants
  - $202,472 in state grants and contracts

- $2.9 million in private non-exchange grants
- $2.1 million in private exchange grants and contracts
- $616,217 in city and county grants

Operating Expenses

Total operating expenses are budgeted at $13 million, representing a $1.6 million increase (+14%) over the preliminary actuals for FY 2024-25, primarily due to program expansion, salary adjustments, and increased scholarship allocations. Significant changes include:

- **Instruction and Research-Program Support** – The 2025-26 proposed budget is $2.4 million, up $519,048 (+28%) from 2024-25 preliminary actuals, reflecting expanded funded activities and new project allocations. The 2025-26 budget includes a $667,000 allocation for contract costs for the CILNE program, with minimal actual expenditures in the 2024-25 fiscal year. The 2025-26 budget also projects $455,347 in administrative overhead expenses as indirect costs to grants and contracts, and the funds are then credited and available in unrestricted College funds.
- **Public and Professional Services-Salaries and Benefits—**The 2025-26 proposed budget of $423,589, up $120,206 (+40%) from 2024-25 preliminary actuals, reflecting additional staff time charged to restricted funds. It includes a $103,777 regular faculty salary buyout from the state classroom budget.
- **Financial Aid-Salaries and Benefits** – The 2025-26 proposed budget of $244,000, up $123,533 (+103%) from 2024-25 preliminary actuals, primarily due to the increased allocation for the CWSP on campus wages.
- **Financial Aid-Scholarships and Fellowships—**The 2025-26 proposed budget of $2.6 million, up $708,219 (+37%) from 2024-25 preliminary actuals, represents increased disbursements in line with donor-restricted scholarship availability. It includes a $440,841 non-state continuation scholarship budget, up to the available cash balance.
- **Student Organizations** – The various student organizations carry cash balances with the college. They are not required to submit budgets, as activities will be funded directly from carryover balances rather than annual budget allocations. In 2024-25, program support of $139,089 was disbursed on behalf of student organizations.

Nonoperating Revenues (Expenses)

Total nonoperating revenues are budgeted at $3.2 million, down $1.1 million (-25%) from FY 2024-25 preliminary actuals, with significant changes in:

- **Donations**—The 2025-26 proposed budget $1.6 million, down $579,462 (-27%) from 2024-25 preliminary actuals, reflecting the absence of large one-time gifts received in FY 2024-25. Approximately $314,000 in one-time donations to the Trial Team, General Scholarship, and CY Pres were removed from the 2025-26 budget. It reflects

projected gifts available for current use from reliable or known sources. The 2025-26 budget includes $650,000 in general support for the Center for Gender and Refugee Studies and $500,000 gift for the Deb AI fund.

- **Net Endowment Payout**—This budget category includes payouts from endowments held by the College and funds held by UC on our behalf. The 2025-26 endowment payout, after deducting the endowment management fee, is projected to be $1.8 million, an increase of $34,988 (+2%) due to higher endowment balances.
- **Unrealized Gain/Loss on Investments—**Market gain or loss on investment is not a budget item, given its volatility and lack of basis for projection. The 2024-25 actual unrealized gain of $224,896 was from CGRS reserves.
- **Net Transfers to/from Other Funds** – A positive number in this category is an addition (transfer from/revenue), while a negative number is a deduction (transfer to/expense). The 2025-26 proposed transfer out of $(162,797) is primarily due to the $192,000 transfer out allocated for the nonstate CILNE program subgrant for research purposes. The subgrant program has not been established to receive the allocated funds.

UNRESTRICTED FUNDS

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

Overview

The proposed FY 2025-26 budget reflects a $(1.5) million net decrease in unrestricted fund net assets, compared to a $(0.8) million decrease in the FY 2024-25 preliminary year-end actuals. The budget includes $702,327 in operating revenues and $4.5 million in net nonoperating revenues/expenses, offset by $6.7 million in operating expenses. The higher projected deficit is primarily due to a 39% reduction in budgeted operating revenues following unusually strong revenue performance in FY 2024-25, along with modest increases in targeted program and staffing costs.

Operating Revenues

Total operating revenues are budgeted to decrease by $457,693 or 39% from FY 2024-25 preliminary actuals, primarily due to the removal of exceptional income sources.

- **Fees**—The 2025-26 proposed budget of $230,415, down 50% from prior-year actuals, mainly due to reduced projections for conference fees. The Equality Action Center removed/cut the Conference program in 2025-26, which had an actual revenue of $197,763 in 2024-25. The 2025-26 budget includes $115,000 in student activity fees for the Wellness Activities program.
- **Other Income** –The 2025-26 proposed budget is $292,778, 45% lower than FY 2024-25 actuals, reflecting the removal of one-time or irregular revenues earned in the prior year. The decrease is mainly attributed to the Equality Action Center projecting services fee revenues (e.g., speaking fees) at $90,000, which is $216,451 lower than the actual revenue received in the 2024-25 period. Other unrestricted revenues include forfeited deposits, event income, and rental income.

Operating Expenses

Total operating expenses are budgeted at $6.7 million, representing a $162,309 (2%) increase from the actual expenses for FY 2024-25. Notable variances include:

- I**nstruction and Research-Salaries and Benefits**—The 2025-26 proposed budget of $1.1 million is up 14% ($135,871) due to additional staffing needs. The budget increase is primarily attributed to the hiring of two new full-time contracted employees (Executive Director and Administrative Assistant) for the new Center for Constitutional Democracy, at a total cost of $345,696.
- **Academic Support-Salaries and Benefits**—The 2025-26 proposed budget is up sharply to $179,306 from $15,000 actuals in FY 2024-25, reflecting planned staffing investment in academic support functions. The budget increase is primarily attributed to the hiring of a full-time Professor of Practice & Associate Director of the LL.M. Program, as well as a part-time administrative support position for the Startup Legal Garage, funded by the non-state Academic Dean Administrative fund at $179,306.
- **Institutional and Building Support-Salaries and Benefits**—The 2025-26 proposed budget of $1.4 million is up 19% ($218,759) from prior year actuals, due to higher personnel costs in the Institutional Advancement department. $1.3 million of the total budget is allocated for salaries and benefits costs for the Advancement department as part of the budget restructuring plan. This is $225,892 more than 2024-25 actuals.
- **Institutional and Building Support-Program Support** – The 2025-26 proposed budget of $1.6 million is down 23% ($504,671), reflecting the completion of prior-year initiatives and one-time projects. $448,500 one-time allocations funded by the Dean's Priorities gift account to support 2024-25 activities related to the art piece in the lobby of 198 McAlister and related project management services have been

removed from the 2025-26 budget. The 2025-26 proposed budget includes a one-time cost of $100,000 for the Comprehensive Campaign Kickoff.

Nonoperating Revenues (Expenses)

Nonoperating revenues (Expenses) are budgeted at $4.5 million, a $48,650 decrease (-1%) from 2024-25 preliminary actuals:

- **Foundation Grants and Other Donations** – The 2025-26 proposed budget of $2.4 million, down 15% ($409,211) due to the removal of large one-time gifts received in 2024-25. Specifically, the donations expected for the Walkup Melodia Discretionary fund had been reduced to $200,000, with $800,000 received in 2024-25. The 2025-26 College budget reflects the Foundation's plan to fund a block grant of $810,000. The preliminary 2024-25 block grant is $605,000. Also budgeted are $501,150 in donations to the Dean's Priorities fund. Gift processing fees (6% deducted from private donations) are projected to provide $600,000 in funding, supporting the Advancement department.
- **Net Endowment Payout**—This budget category includes payouts from the College's endowments, deducting the endowment management fee. The 2025-26 unrestricted net endowment payout is projected at $530,962, a 5% increase ($25,880) from the prior year's actuals, due to higher endowment balances.
- **Unrealized Gain/Loss on Investments—**Market gain or loss on investment is not a budget item, given its volatility and lack of basis for projection. The 2024-25 actual amount of $1.6 million is primarily derived from the unrealized gain on the investment of state plant fund reserves, at $1.2 million.
- **Net Transfers to/from Other Funds**—A positive number in this category is an addition (transfer from/revenue), while a negative number is a deduction (transfer to/expense). The 2025-26 budget projects a net increase to unrestricted funds of $1.1 million, compared to a $754,547 transfer out in 2024-25. It includes a $446,286 transfer from non-state Auxiliary Special Events and Guest Services. This auxiliary enterprise operation provides funding for other non-state college-wide expenses that lack their revenue sources. The 2025-26 budget also includes $710,000 projected transfers from the C&D donor funds to fund the Cotchett Bridget Fellowship and summer grants. Since these awards won't be distributed until January, we will budget the transfers out at the midyear budget revision to offset the transfers in.

Endowed Funds Spending Rate and Cost Recovery Surcharge

- Endowment Spending Rate – The budget for endowed funds reflects a total return spending policy permitting the expenditure of both current income and a portion of appreciation. As approved by the Board of Directors in March 2025, the spending rate for 2025-26 remains at 4.0 percent, calculated on the 12-quarter rolling average market value of all endowed funds (January 2022–December 2024).

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

5. PROPOSED RESOLUTION

Resolved that the Board of Directors approves the attached non-state proposed budget for 2025-26.

Attachments: Non-State Proposed Budget for 2025-26

	Proposed Budget 2025-26		Preliminary Year-end Actual 2024-25	Dollar Change from FY26 Budget to Preliminary FY25 Year-end Actual	% Change from FY26 Budget to Preliminary FY25 Year-end Actual	Year-end Actual 2023-24
REVENUES						
Grants and Contracts	6,897,829	*	7,627,189	(729,360)	-10%	6,032,940
Other Income	98,667		83,145	15,522	19%	1,041,791
TOTAL OPERATING REVENUES	**$ 6,996,496**		**$ 7,710,334**	**$ (713,838)**	**-9%**	**$ 7,074,731**
EXPENSES						
Instruction and Research						
Salaries and Benefits	6,901,122		6,774,792	126,330	2%	5,903,131
Program Support	2,350,727	*	1,831,679	519,048	28%	1,741,683
Public and Professional Services						
Salaries and Benefits	423,589	*	303,383	120,206	40%	327,693
Program Support	99,974		90,632	9,342	10%	132,639
Academic Support						
Salaries and Benefits	-		-	-	--	-
Program Support	-		-	-	--	-
Student Services						
Salaries and Benefits	-		-	-	-	4,412
Program Support	97,699		11,194	86,505	773%	13,428
Institutional and Building Support						
Salaries and Benefits	36,258		34,238	2,020	6%	36,692
Program Support	173,539		109,650	63,889	58%	180,462
Financial Aid						
Salaries and Benefits	244,000	*	120,467	123,533	103%	10,000
Program Support	15,838		3,927	11,911	303%	1,686
Administrative Overhead	10,000		-	10,000	-	-
Scholarships and Fellowships	2,622,270	*	1,914,051	708,219	37%	2,006,797
Student Organizations						
Program Support	-	*	139,089	(139,089)	-100%	113,471
TOTAL OPERATING EXPENSES	**$ 12,975,016**		**$ 11,333,100**	**$ 1,641,916**	**14%**	**$ 10,472,092**
NET OPERATIONS	**$ (5,978,520)**		**$ (3,622,766)**	**$ (2,355,754)**	**65%**	**$ (3,397,361)**
NONOPERATING REVENUES (EXPENSES)						
Donations	1,566,687	*	2,146,149	(579,462)	-27%	2,046,707
Investment Income	17,000		25,854	(8,854)	-34%	28,003
Net Endowment Payout	1,821,710	*	1,786,722	34,988	2%	1,618,656
Realized Gain/Loss on Sale of Investments	-		(211)	211	-100%	917
Unrealized Gain/Loss on Investments	-	*	224,896	(224,896)	-100%	194,211
Net Transfers to/from Other Funds	(162,797)	*	147,636	(310,433)	-210%	516,851
TOTAL NONOPERATING REVENUES (EXPENSES)	**$ 3,242,600**		**$ 4,331,046**	**$ (1,088,446)**	**-25%**	**$ 4,405,347**
TOTAL CHANGE IN NET ASSETS	**$ (2,735,920)**		**$ 708,280**	**$ (3,444,200)**	**-486%**	**$ 1,007,986**

*See attached narrative.

Non-State Budget - 2025-26 Proposed Budget
Unrestricted Funds

			Preliminary	Dollar Change	% Change	
	Proposed Budget 2025-26		Year-end Actual 2024-25	FY26 Budget to Preliminary FY25 Year-end Actual	FY26 Budget to Preliminary FY25 Year-end Actual	Year-end Actual 2023-24
REVENUES						
Dues/Memberships	130,000		145,000	(15,000)	-10%	150,000
Fees	230,415	*	456,723	(226,308)	-50%	317,647
Private Grants and Contracts	10,800		4,553	6,247	137%	2,111
Other Income	292,778	*	531,327	(238,549)	-45%	338,698
Overhead Allowances	38,334		22,417	15,917	71%	30,386
TOTAL OPERATING REVENUES	**$ 702,327**		**$ 1,160,020**	**$ (457,693)**	**-39%**	**$ 838,842**
EXPENSES						
Instruction and Research						
Salaries and Benefits	1,089,917	*	954,046	135,871	14%	1,136,545
Program Support	286,902		289,314	(2,412)	-1%	412,832
Public and Professional Services						
Salaries and Benefits	62,445		53,573	8,872	17%	33,372
Program Support	80,838		30,654	50,184	164%	12,884
Academic Support						
Salaries and Benefits	179,306	*	15,000	164,306	1095%	-
Program Support	74,750		34,261	40,490	118%	24,340
Student Services						
Salaries and Benefits	8,227		57,936	(49,709)	-86%	52,807
Program Support	708,870		623,303	85,567	14%	377,647
Institutional and Building Support						
Salaries and Benefits	1,390,075	*	1,171,316	218,759	19%	820,501
Program Support	1,645,568	*	2,150,239	(504,671)	-23%	1,120,268
Financial Aid						
Scholarships and Fellowships	1,145,586		1,130,533	15,053	1%	947,168
Program Support	-		-	-	--	-
TOTAL OPERATING EXPENSES	**$ 6,672,484**		**$ 6,510,175**	**$ 162,309**	**2%**	**$ 4,938,363**
NET OPERATIONS	**$ (5,970,157)**		**$ (5,350,155)**	**$ (620,002)**	**12%**	**$ (4,099,521)**
NONOPERATING REVENUES (EXPENSES)						
Foundation Grants and Other Donations	2,392,536	*	2,801,747	(409,211)	-15%	2,840,120
Investment Income	167,045		153,244	13,801	9%	165,866
Net Endowment Payout	530,962	*	505,082	25,881	5%	292,696
Endowment Management Fee Revenue	288,816		269,949	18,867	7%	244,033
Realized Gain/Loss on Sale of Investments	-		819	(819)	--	386
Unrealized Gain/Loss on Investments	-	*	1,573,001	(1,573,001)	-100%	1,158,447
Net Transfers to/from Other Funds	1,121,286	*	(754,547)	1,875,833	-249%	261,659
TOTAL NONOPERATING REVENUES (EXPENSES)	**$ 4,500,645**		**$ 4,549,295**	**$ (48,650)**	**-1%**	**$ 4,963,209**
TOTAL CHANGE IN NET ASSETS	**$ (1,469,512)**		**$ (800,860)**	**$ (668,652)**	**83%**	**$ 863,687**

*See attached narrative.

ACTION ITEM

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

2. SUBJECT: State Contracts in Excess of $100,000

3. RECOMMENDATIONS:

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

Item: *6.4.1

Title: Avidex 360 Audio Visual Support Services
Vendor Name: Avidex
Cost: $171,000
Term of Contract: 8/11/2025 – 8/10/2026

Description: Provides essential support for audio visual equipment across campus, to include classrooms, breakout rooms, courtrooms, and meeting rooms.

Item: *6.4.2

Title: Consulting - Financial Advisory Services – Tower Seismic Upgrade
Vendor Name: CSG Advisors Incorporated
Cost: $140,000
Term of Contract: 8/22/2025 – 12/31/2028

Description: Consultant to provide support on the upcoming bond issuance, including structuring, market analysis, stakeholder coordination, and regulatory compliance in support of Phase 2 of the 100 McAllister Tower Renovation project. Services also include support for the federal Historic Tax Credit process. The vendor has been selected through a competitive Request for Proposals (RFP) process in accordance with UC Law SF procurement policies.

4. PROPOSED RESOLUTION:

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

*6.4.1	Avidex 360 - Audio Visual Support Services	$171,000
*6.4.2	CSG Incorporated Inc. - Professional Services Agreement	$140,000

ACTION ITEM

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

2. SUBJECT: Financial Operations Policy Manual – Update

3. RECOMMENDATION:

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

4. BACKGROUND

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

Section 10.0 - Travel

A review is performed yearly of UC policies at other locations to ensure that UC Law SF stays within the same or similar limits for travel and entertainment.

UC Law SF does not currently impose a cap on the allowable per-night cost of hotel stays. Effective January 2024, the University of California Office of the President established a maximum lodging allowance of $333 per night for university business travel, consistent with the U.S. General Services Administration rates.

The $333 cap applies to the room rate only and excludes the following charges:

- State, county, municipal, and other taxes
- Resort fees
- Other mandatory fees

It is proposed that for staff traveling on College-related business, the per-night limit for lodging be set at the UCOP rate of $333.

Section 16.0 – Grants

The current Bylaws and Standing Orders of the Board of Directors are not fully aligned with the Fiscal Operations and Policy Manual. Under the existing Bylaws and Standing Orders, Board approval is not required for gifts and grants exceeding $100,000 unless one of the conditions outlined in Standing Order 100.4(m) applies:

1) *Exceptions to approved College programs and policies; or commitments for more than five (5) years; or obligations on the part of the College to expenditures or costs for which there is no established fund source.*
2) *Affiliation agreements with other institutions involving direct financial obligations or commitments to programs not previously approved.*
3) *Any gift of real estate, mineral rights, ground leases, partnership interest, encumbered property, or privately held securities.*
4) *The naming of any College chair, scholarship, endowment, room, building, or other College facility or area.*

It is recommended that the Fiscal Operations and Policy Manual be updated to incorporate the above exceptions to Board of Directors' approval requirements for grants and gifts.

5. PROPOSED RESOLUTION:

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

~~00-00~~16.0. Grants Management

Policy # ~~00-00~~16.0
Subject: **Grants Management**
Internal Policies and Procedures **of University of California~~, Hastings~~ College of Law, San Francisco**
Effective Date: March 11, 2021 Revision Dates: ~~None~~~~July 1~~August 4, 2025
Purpose: The purposes of these policies are: (1) to establish grants management responsibility and workflow;[1] (2) to ensure that the financial and accounting aspects of the grants management function within the University of California~~, Hastings~~ College of Law, San Francisco ("UC Law SF"~~H~~ or the "College") are~~is~~ well managed, performed consistently, and adequately documented; and (3) to ensure that financial information is available in a consistent and reliable format for those responsible for managing grant-funded programs.
Scope: These policies apply to all employees involved in any activity related to the management of grants (public, private, or other) obtained by ~~UCH~~UC Law SF. These policies also apply to those seeking and obtaining grants that are providing financial information to, or obtaining financial information from, the Office of Fiscal Services. Because grants management is interdepartmental, and because departmental procedures are intertwined, these policies affect processes in departments in addition to the Office of Fiscal Services and thus were developed collaboratively with the Provost & Academic Dean's Office (including the Office of Sponsored Projects), Academic Program Services, Human Resources, Office of Advancement, and the Office of General Counsel. Other College policies also affect grants administration and should be consulted regarding various aspects of grants, including human resources, intellectual property, conflicts of interest, and research conduct issues. *Throughout this document, words like "must" and "should" are used. When the term "must" is used, no group or individual has the authority to deviate from the specific policy or procedure, unless authority is specifically provided or delegated in accordance with the terms of this policy. The term "should" is used to convey that individuals are expected to follow the policy and procedures as written and are required to justify any deviations. Deviations should only occur when the specifics of the situation justify a reasonable departure from the recommended policy and procedures.*
Definitions: The definitions below define standard wording referred to throughout ~~UCH~~UC Law SF's Policies and Procedures and apply to all instances where a word/phrase is used. • Approved College Center: A center that has been approved by the Chancellor & Dean or Provost & Academic Dean, for which the College has appointed a director or co-directors, and which has been

[1] Throughout this document, the term "grant" is used expansively to refer to any external funding source for any third-party-sponsored project.

allocated a budget. Research Centers as defined in the Faculty Rules are one type of Approved College Center.

- ~~Colleague: The Colleague system is utilized by UCH for all financial and accounting functions.~~
- ~~UCPath: The UCPath system is the system of record for payroll, benefits, and human resource (HR) related employment information.~~
- ~~Axiom: The Axiom system is utilized by UCH for all budgetary functions.~~
- ~~Fiscal: The Office of Fiscal Services or Finance Department within UCH.~~
- Principal Investigator (PI): The ~~UCH~~UC Law SF employee that is designated as the oversight authority for managing a specific grant-funded project.
- Fiscal: The Office of Fiscal Services or Finance Department within UC Law SF.
- Office of Sponsored Projects (OSP): The Office of Sponsored Projects within the Provost & Academic Dean's Office that supports UC Law SF employees in obtaining and managing sponsored (i.e., externally-funded) projects.
- Office of Human Resources (HR): The Office of Human Resources within UC Law SF.
- ~~Academic Dean's Office (AD): The Office of the Academic Dean within UCH.~~
- Office of General Counsel (OGC): The Office of General Counsel within UC Law SF.
- Provost & Academic Dean's Office (ADO): The Office of the Provost & Academic Dean within UC Law SF.
- ~~The Office of Sponsored Projects (OSP): The Office of Sponsored Projects within the Academic Dean's Office that supports UCH employees in obtaining and managing sponsored (i.e., externally-funded) projects.~~
- ~~The Office of Human Resources (HR): The Office of Human Resources within UCH.~~
- ~~The~~ Chief Financial Officer (CFO): The Chief Financial Officer of ~~UCH~~UC Law SF.
- ~~The Office of General Counsel (OGC): The Office of General Counsel within UCH.~~ Advancement: The Office of Advancement within UC Law SF.
- Colleague: The Colleague system is utilized by UC Law SF for all financial and accounting functions.
- UCPath: The UCPath system is the system of record for payroll, benefits, and human resource (HR) related employment information.

I. Roles and Responsibilities

A. PI Responsibilities: With support from Fiscal and OSP, the PI is responsible for the following activities for all grants that they oversee:

1. Developing a detailed budget, that correlates with the account structure available in the Fiscal system and permitted by the sponsor.[2]
2. Reviewing and approving the established budget and working with OSP to obtain necessary internal reviews/approvals, prior to submission of the grant proposal.
3. Reviewing and approving the grant agreement and working with OSP to obtain necessary internal reviews/approvals, prior to execution of the agreement and entry of the budget into Colleague.
4. Monitoring budget to actual expenditures throughout the term of the grant and addressing any potential overages or spending concerns as soon as possible.
5. Monitoring and approving all expenditure activity and ensuring that all costs charged to a grant are adequately supported, including salary and benefit allocations.

[2] The terms "funder," "sponsor," and "grantor" are used interchangeably throughout this document.

6. Ensuring all reporting grant requirements are adhered to and working with Fiscal & OSP to ensure that financial and performance reports submitted are accurate and submitted ~~by the due date~~in accordance with grant deadlines.~~.~~
7. Ensuring all required documents, reports, and support are saved in ~~the applicable~~a designated grant file ~~on the shared drive.~~on the UC Law SF server and/or online database (e.g., Box.com, OneDrive).

B. Fiscal Responsibilities: Fiscal is responsible for the following financial activities for all UC ~~Hastings~~Law SF grants:
1. In coordination with OSP, working with PI to establish a detailed budget that correlates with the account structure available in Colleague, including providing assistance to the PI to ensure that budgeted costs are correctly categorized.
2. Reviewing and approving ~~the~~ proposal budget~~st~~ prior to submission ~~to sponsor~~ to ensure compliance with ~~UCH~~UC Law SF Fiscal policies.
3. Reviewing and approving ~~the~~ grant agreements prior to execution to ensure the grant ~~total~~ budget ~~prepared ties to~~aligns with the grant agreement and complies with UC Law SF Fiscal policies.~~.~~
4. Entering the budget into ~~Axiom~~ Colleague and ensuring a review is performed by a separate Fiscal employee to ensure the budget entered ties to the underlying budget approved by the PI and the project sponsor.
5. Preparing, and ensuring the accuracy of, ~~the~~ Budget Monitor~~ing Tools reports~~ to present timely budget to actual data, by grant, on a monthly basis.
6. Reviewing all grant expenditures requested (purchasing) and submitted for payment (accounts payable processing) for the reasonableness of coding, appropriate supporting documentation, and proper approval.
7. Processing approved funding changes in UCPath.
8. Initiating reclassifications of expenses through the Transaction Reclassification and Correction form (non-salary expenses), or through a Salary Cost Transfer in UCPath (salary expenses).
9. Providing resources and assistance to the PI in the preparation of financial reports for grant requirements and for establishing an internal review process to verify the accuracy of all reports prior to submission to the funder and submitting required budget reports to funders in coordination with the PI.
10. Setting up the initial grant file, labeling it appropriately, and monitoring the contents for completeness of grant records.

C. OSP Responsibilities: OSP is responsible for the following financial activities for all UC ~~Hastings~~Law SF grants:
1. In coordination with Fiscal, working with PIs to ~~establish~~ develop a detailed proposal budget, that correlates with the account structure available in the Fiscal system including providing assistance to the PI to ensure that budgeted costs are correctly categorized.
2. Reviewing and approving all ~~-~~letters of interest ("LOIs~~s~~", also known as "letters of intent", "pre-proposals", "statements of interest", or other similar terms)[3] ~~.to…~~

[3] Grant solicitations often involve a multi-stage application process, beginning with the submission of an LOI, which typically include basic information on the applicant and its request for funding, but do not include detailed financial information (e.g., salaries, fringe benefit rates, indirect cost rates, etc.) and do not impose any

3. Reviewing all project grant proposals (e.g., narrative, budget, and other supporting documentation)~~the established budget~~ and working with the PI to obtain necessary internal reviews/approval prior to submission of the grant proposal.
4. Reviewing all~~the~~ grant agreements and working with PI to obtain necessary internal reviews/approval prior to execution of the agreement.
5. As required, supporting PI's unaffiliated with mature Research Centers with the following:
    a. Monitoring budget to actual expenditures throughout the term of the grant and addressing any potential overages or spending concerns as soon as possible.
    b. Monitoring and approving all expenditure activity and ensuring that all costs charged to a grant are adequately supported, including salary and benefit allocations.
    c. Ensuring all reporting grant requirements are adhered to, and working with Fiscal to ensure that financial and performance reports submitted are accurate and submitted by the due date.
    d. Ensuring all required documents, reports, and support are saved in the applicable grant file on~~the~~ the UC Law SF server and/or online database (e.g., Box.com, OneDrive).~~shared drive.~~
6. In coordination with Advancement, supporting fundraising efforts and ensuring both grant and non-grant funding to the College is properly categorized and managed, in accordance with relevant UC Law SF policies/procedures.

D. HR Responsibilities: HR is responsible for the following financial activities for all UC ~~Hastings~~Law SF grants:
    1. Supporting OSP and Fiscal during the budget establishment process to ensure salaries, benefits, stipends, staffing allocations, and other HR-related items are properly included in grant budgets in accordance with ~~UCH~~UC Law SF HR policies and records.
    2. Responding to questions about ~~salaries, benefits, staffing allocations, and other HR-related items~~ to ensure grants budgets are properly prepared and ~~and~~ recorded.
    ~~2. .~~
    3. ~~Working with PIs to~~In coordination with PIs, drafting and executinge offer letters, appointment modifications, and other staffing related documents for grant-funded ~~staff funded by grants.~~personnel. Maintaining executed agreements, approved modifications, and other staffing related documents~~.~~ in personnel folders.
    4. In coordination with PIs, OSP, and Fiscal, setting up~~Reviewing and processing~~ grant-funded personnel ~~in the UC Path system and (as necessary) processing adjustments to grant-funded employment adjustments submitted by the PI.~~s ~~alaries, benefits, staffing allocations, and other payroll-related items.~~
    ~~4.~~5. In coordination with PIs, OSP, and Fiscal, helping ensure salaries, benefits, stipends, staffing allocations, and other HR-related items are properly included in grant reporting in accordance with UC Law SF HR policies and records and sponsor requirements.

E. OGC Responsibilities: OGC is responsible for the following activities for all UC ~~Hastings~~Law SF grants:

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legal/financial obligations on the applicant. Under this policy, LOIs that (1) do not include detailed financial information, 2) do not impose any legal obligations on the College, and (3) OSP determines generally align with UC law SF academic mission/values and grants policies do not require review/approval by ADO or Fiscal.

1. Reviewing and approving all grant agreements, contracts, and other grant-related legal documents which will be signed on behalf of the College prior to execution to ensure compliance with applicable laws, regulations, and policies.
2. As required, supporting PIs and OSP to develop sub-grants, subcontracts, or other relevant legal documents.
3. ~~Reviewing PI requests for exemption from Institutional Review Board (IRB) review, as applicable, and maintaining records related to that process for the applicable retention period. (Note: Departmental responsibility for this task may be shifted in the event that an IRB administrator is available to perform the work.)~~
4. Identifying provisions of grant agreements that may be inconsistent with applicable laws, regulations, and policies or other institutional considerations. For instances where resolution of ~~such~~UC Law SF issues with the PI cannot be achieved to the satisfaction of ~~the~~ OGC, the Provost & Academic Dean and CFO are advised, with ultimate decision-making authority resting with the Chancellor & Dean.

Commented [NCY1]: Question for OGC: Is this accurate that C&D has ultimate authority?

Commented [YN2R1]: John confirmed on June 1

F. ADO Responsibilities: ADO is responsible for the following activities for all UC ~~Hastings~~Law SF grants:
   1. Reviewing and approving all grant proposals prior to submission to ensure compliance with UC Law SF academic mission and values and faculty member staffing and compensation policies in the Faculty Personnel Manual. ~~and all grant awards prior to execution of the grant agreement to ensure compliance with UCH academic mission and values.~~
   2. Reviewing and approving all grant awards prior to execution to ensure compliance with UC Law SF academic mission and values and ~~grant work as consistent with~~ faculty member staffing and compensation policies in the Faculty Personnel Manual.
   2. ~~Reviewing PI requests for exemption from Institutional Review Board (IRB) review, as applicable, and, in coordination with the PI and OSP, maintaining records related to that process for the applicable retention period. (Note: Departmental responsibility for this task may be shifted in the event that an IRB administrator is available to perform the work.)~~
   3.

G. CFO Responsibilities: ~~-~~CFO has primary responsibility for managing the College's finances, including financial planning, management of financial risks, record-keeping, and financial reporting to internal and external parties.

~~G.~~ Advancement Responsibilities: Advancement is primarily responsible for leading the College's efforts to secure and manage non-grant funding through cash, stock and check donations, ~~gifts/donation,~~ endowments, scholarship support, sponsorships, ~~and other forms of non-grant support from private individuals (including alumni),~~ foundations, non-profits, corporations, and other entities. Given the potential overlap between ~~grant and gift funding~~Advancement donors and prospects and grant donors, OSP and Advancement work collaboratively to support fundraising efforts and ensure both grant and non-grant funding to the College is properly categorized and managed, in accordance with relevant UC Law SF policies/procedures.

H.

~~H.~~I. Delegation of Authority: Unless specifically prohibited within this policy, authority to complete and approve the responsibilities/procedures detailed in this policy may be delegated for (a) any grant allocating general operating funds with a total value of under $1050,000 and (b) any other non-federal grant with a total value of under $1050,000. All delegations of authority must be documented in writing and approved by the CFO ~~and OGC~~.

~~I.~~J. If users of this policy have any questions on the requirements or procedures, they should contact the PI, Fiscal, or OSP for guidance.

II. Procedures

A. Pre-Award Budget Procedures

1. Budget Preparation: With support from Fiscal and OSP, as required, the PI must prepare a detailed proposal budget, along with relevant supporting documents (e.g., budget narrative, biosketch, etc.), that complies with sponsor requirements and ~~UCH~~UC Law SF policies and procedures.

2. Budget Review and Approval: The PI must approve the ~~detailed~~ proposal budget and submit it, along with the full grant proposal (e.g., narrative, budget, supporting documents), to OSP for review **at least ~~6~~6 business days** prior to the sponsor's deadline. OSP must review the budget and full grant proposal and submit to the ~~AD and~~ Fiscal & ADO for review. Fiscal & ADO must approve ~~the budget, along with~~ the full grant proposal prior to submission.~~.~~

3. Budget Submission: Upon approval from Fiscal, OSP shall ~~must~~ submit the budget, along with the full grant proposal to the sponsor~~. However,~~. Alternatively, ~~the~~ the PI (or ~~associated Research Center~~designated staff) may directly submit a grant proposal ~~with all~~once all necessary internal approvals have been obtained and OSP has authorized the proposal for submission.

B. Post-Award Procedures

1. Award Notification: Upon receiving a notification of award, the person receiving notice must notify OSP, and OSP should notify the PI (if necessary), Fiscal, and OGC of the incoming award and submit the award documents, including the grant agreement, budget, and all other supporting documents to the PI for review. Once the PI has completed their review, OSP should send the award documents to the ADO, OGC, and Fiscal for review.

2. Internal Review and Approval of Grant Award: The PI must approve the award to ensure the statement of work and budget are appropriate and align with the submitted proposal and coordinate with OSP to obtain review of the award and grant agreement from the ADO, OGC, and Fiscal. OSP must coordinate with the PI, ADO, OGC, Fiscal, and the sponsor to address any changes to the budget or other award documents during the contracting process. The ADO and OGC must review the award and, following their review, Fiscal must approve the final grant award.

3. OGC Review and Approval of Grant Agreements: All grant agreements, contracts, and other grant-related legal documents which will be signed on behalf of the College are subject to

review and approval by OGC prior to execution. Notwithstanding Article I.H., delegation of OGC approval authority is prohibited.

4. Board Review: Grants and other awards ~~All grants are subject to~~may be subject to review and require approval by the UC Law SF Board of Directors, as indicated in the relevant governing documents.

   For all awards requiring Board approval, ~~over $10~~50,000, ~~approval of the UCHUC Law SF Board of Directors~~authorization must also be obtained prior to ~~start of grant activities~~execution of the relevant award document. ~~In cases where obtaining Board of Directors approval prior to starting grant activities could negatively impact the PI's ability to implement the grant in accordance with relevant grant terms/conditions (e.g, the next quarterly Board of Directors meeting is scheduled after the grant start date), the CFO may provide provisional approval for awards over $100,000, in advance of presenting the award to the Board at the next scheduled meeting.~~

   ~~4.~~ For awards over $100,000 that do not require Board approval, the award shall be reported to the Board Finance Committee at the next regularly scheduled meeting after receipt of the awarded funds. The dollar threshold for requiring the reporting of awards~~for requiring UCHUC Law SF Board approval~~ to the Board Finance Committee may be increased as ~~such~~UC Law SF thresholds are adjusted ~~from time to time~~ by the Board of Directors. Pursuant to Article I.H., delegation of Board approval authority is prohibited.

5. IACUC Review: For grants involving animal subjects, Institutional Animal Care and Use Committee (IACUC) review must be obtained prior to start of grant activities. IACUC review authority may not be delegated.

6. IRB Review: For grant projects involving human subjects, IRB review must also be obtained prior to start of grant activities. All other IRB matters are covered by separate policies. Faculty conducting human subject research need to refer to, be knowledgeable about, and comply with those procedures. IRB review authority may not be delegated.

7. Award Execution: Following all relevant reviews and approvals (as detailed above), OSP must coordinate with OGC/Fiscal and the sponsor for execution of the grant agreement. The fully executed grant agreement, along with any supporting documents, must be forwarded to Fiscal for ~~Fiscal~~ grant file setup and ~~for~~ fund ~~and~~/ budget setup in ~~the system~~Colleague, and to the PI and Procurement for filing in the appropriate grant or contract files.

8. Grant Kick-off Meeting (Optional): As appropriate, a grant kick-off meeting ~~should~~ may be held between various ~~UCH~~UC Law SF stakeholders including the PI, Fiscal, OSP, and other individuals who will be involved with the grant at any functional level. Ki~~This ki~~ck-off meeting ~~should~~ may address:
   a. Designated roles and responsibilities including those related to budget monitoring, compliance reporting, expenditure processing and tracking, filing, etc.
   b. Compliance requirements applicable to the grant, and the expected assistance needed from Fiscal, OSP, or other support functions within ~~UCH~~UC Law SF.

c. Any expected assistance needed from Fiscal, OSP, or other support functions of ~~UCH~~UC Law SF throughout the life of the grant that fall outside of the assigned responsibilities within this policy.

~~d. Such kickoff meetings are optional for short term or renewal grants where the PI and team have an established relationship with the funder.~~

9. Grant Files: Fiscal and the PI/OSP must establish separate record-keeping systems to maintain final grant documents, including executed copies of all grant award notifications and contracts. Fiscal grant files must be established for each new award and should be accessible only by designated Fiscal staff involved in the grants management process. PI/OSP grant files must be established for each new award and should be accessible only by the PI, OSP, and other designated staff involved in the grant management process. All grant files should be accessible via the UC Law SF server and/or online database (e.g., Box.com, OneDrive).~~the UCH shared drive and organized and labeled to enable easy identification and use.~~

   ~~Fiscal Grant File:~~ The following grant-related documents should be maintained in the Fiscal & PI/OSP grant files:

   a. Final grant proposal or grant application and all supporting forms.
   b. Award notification.
   c. All grant financial and other compliance-related reports submitted throughout the grant term.
   d. Final signed contract and any amendments.
   e. Budget ~~to~~ Monitor~~sing Tool reports~~ and other performance reports used internally for grant monitoring.
   f. Correspondence from the funder/grantor.
   g. Documentation of approvals for report reviews required by this policy.
   h. Other key information related to the grant.

   ~~PI/OSP Grant File: The following grant-related documents should be maintained in the PI/OSP grant file:~~

   ~~a. Final grant proposal or grant application and all supporting forms.~~
   ~~b. Award notification.~~
   ~~c. All grant technical, financial, compliance and other reports submitted throughout the grant term.~~
   ~~d. Final signed contract and any amendments.~~
   ~~e. Budget to Monitoring Tool reports and other performance reports used internally for grant monitoring.~~
   ~~f. Correspondence from the funder/grantor.~~
   ~~g. Documentation of approvals for reviews/approvals required by this policy.~~
   ~~Other key information related to the grant.~~

C. Budget Finalization

1. Budget Adaptation: Once the grant award is executed and submitted to Fiscal, Fiscal will arrange a meeting with the PI and OSP (~~,~~ as ~~required~~necessary)~~,~~ to discuss the budget included in the grant award and align the budget line items from the award with the categories available in the existing ~~UCH~~UC Law SF chart of accounts. The grant budget must be translated to conform with the College line-item budget categories for Fiscal to set up an account/fund for the award.

Fiscal will assist with translating this information back into funder-required budget formats, as required for reporting.

2. Finalizing the Budget: Fiscal will review the final budget before execution of the grant agreement and verify that in total, it reconciles to the award, appears reasonable and achievable, and that the line-items tie to the College's account structure.

D. Fund and Budget Setup

1. Fund Setup: Upon receipt of a fully executed grant agreement, Fiscal will set up the fund in Colleague based on the grant award and budget and work with the PI and OSP if any additional information or clarification is required. Fiscal will notify the PI and OSP once the fund is set up.

2. Budget Entry: Once the fund is established, Fiscal will enter the budget based on the finalized budget, ensuring the proper Budget Officer is assigned. Fiscal will ensure that an independent review of the budget entered into Colleague is performed by an individual not involved in the initial entry. This review will ensure that the budget entered ties, by individual line item, to the amounts presented in the final budget submitted to Fiscal and approved by the PI and project sponsor. This review will be documented and retained in the Fiscal grant files.

E. Incurring Expenditures and Paying Invoices

1. Incurring Grant Expenditures: All grant-related purchases and expenditures are subject to the standard College purchasing and expenditure policies and procedures. However, when a purchase is anticipated to be funded with a grant, additional scrutiny is required.
    a. PI Responsibilities: The PI is ultimately responsible for:
        i. Understanding allowable costs under the grant terms and other applicable rules in order to specifically distinguish which costs can be charged to the grant and which cannot.
        ii. Reviewing each purchase request that relates to the use of grant funds to ensure it is allowable.
        iii. Reviewing each invoice received from vendors and approving it for payment. A detailed review of the invoice charges must be performed, and confirmation must be documented that the related full expense should be charged to the grant.
        iv. Ensuring that all costs incurred under an award are charged directly to the appropriate award account, fund number, sub account (if applicable) and object codes, as they are incurred.
        v. Ensuring that all payroll-related expenses are adequately documented and supported, including all allocation methodologies applied. This allocation support should be kept current and should be provided to Fiscal prior to incurrence of the related payroll expense whenever possible to prevent the need for reclassing of payroll expenses.
        vi. Submitting any funding or staffing adjustments and retroactive salary reclassifications in a timely manner to HR and Fiscal. Appointment and compensation adjustments are subject to College-wide policies.
    b. Fiscal Services Responsibilities: Fiscal is responsible for the following as it relates to grant expenditures:

i. Processing vendor and sub-awardee payments and payroll. If adequate supporting documentation or required approvals are not submitted, Fiscal will follow-up with the responsible PI.
ii. Ensuring all supporting documentation for vendor payments and payroll-related expenditures is maintained in an organized manner to support the amounts being charged to individual grants.
iii. Reviewing payroll-related allocations at a high level to ensure they appear reasonable and supported by an underlying calculation. Fiscal will file (electronically) the support for payroll allocations and any reclass entries processed.
iv. Processing funding changes communicated by the PI and initiating salary cost transfers (SCT) to adjust retroactive payroll expenses in UCPath.
v. Calculating and recording any indirect cost rates applied to each grant. Documentary support for the indirect cost rate calculation and expense entries should be included in the Fiscal grant file to record the expense to applicable grants.

c. OSP Responsibilities: OSP is responsible for the following as it relates to grant expenditures:
i. Providing support and guidance to PIs and Fiscal regarding the compliance requirements related to allowable costs for the grant.
ii. As required, providing support and guidance to PIs, Fiscal, and HR regarding any of the above-listed responsibilities related to grant expenditures.

d. HR Responsibilities: HR is responsible for the following as it relates to grant expenditures:
i. Providing support and guidance to PIs and Fiscal regarding payroll, benefits, and other staffing-related issues to ensure compliance with ~~UCH~~UC Law SF HR policies.
ii. As required, processing and approving staffing adjustments and retroactive salary reclassifications submitted by the PI.

2. Compliance Supporting Documentation: The supporting documentation required to show compliance with grant expenditure requirements is dependent on the type of expenditure and the terms and conditions of the grant. The PI and Fiscal, with support from OSP and other departments as required, must assess the compliance requirements for each grant to ensure the required supporting documentation is submitted and included in the relevant grant files. These requirements should be discussed during the grant kick-off meeting to ensure all expenditures are adequately supported.

~~a. Personnel Activity Reports (PAR): When grant staff are paid from federal funds, they must complete Personnel Activity Reports (PAR). These reports are required quarterly from all academic and nonacademic staff with any portion of their salaries paid from federal funds, whether directly via a federal grant or contract, via flow-through funds from a non-federal sponsor, or providing reportable cost-sharing or matching to federal awards from any other fund source.~~

~~HR should prepare PARs for all staff charged to grants on a quarterly basis and submit them to the PIs for review. The PI must review all PARs for staff charged to a specific grant on a quarterly basis to ensure the level of effort applied to a grant is still accurate and allowable. The PIs should coordinate with relevant staff to review and sign PARs and~~

~~submit them to Fiscal and HR for inclusion in the relevant Fiscal grant files and HR personnel files.~~

F. Grant Payment Requests (Invoicing)

1. The PI and Fiscal, with support from OSP as required, must monitor grant periods of performance and grant expenditures. This monitoring should include developing schedules for submission of invoices to the sponsor and tracking actual expenses incurred, projected expenses, and remaining grant periods to ensure expenditures are appropriately planned and incurred to ensure completion of the grant scope of work within available budget and time limitations. Fiscal should serve as a resource for developing customized reports to monitor grant expenditures.

2. Fiscal Services Responsibilities: Fiscal Services is responsible for:
    a. Monitoring grant invoicing schedules and preparing and submitting all invoices to sponsors in a timely manner in accordance with the terms of the grant;
    b. Ensuring the PI provides adequate supporting documentation for each expense included in an invoice and attaching it to the invoice, as required;
    c. Ensuring all billing and financial reporting is completed in accordance with the terms and conditions of the applicable grant agreement;
    d. Recording all journal entries to record grant receivable and deferred revenue activity and maintaining supporting documentation for all entries;
    e. Coordinating with the PI if there are any questions during the invoicing/billing process.

G. Budget to Actual Monitoring

1. Budget Monitor~~ing Report~~: The Budget Monitor~~ing Report~~ was developed to assist PIs, Fiscal, and OSP to monitor grant expenditures, to help bridge gaps between the College's fiscal year (July 1 through June 30), which the Colleague system applies for all revenue and expenditure reporting, and the various periods/grant years required based on specific grant funding requirements, and to provide additional customizability and functionality in grant tracking and reporting for PIs, Fiscal, and OSP~~., given the limitations of the Axiom Grants Module.~~
    a. ~~*Report Generation*~~*Content*: The Budget Monitor~~ing Report~~ will show, for each active grant, revenues, expenditures, and projections in a budget-to-actual presentation. The budget-to-actual amounts will be presented by object code (line item) to present variances between available grant funds and total expenditures and projections.
        i. Positive variances represent actual revenues or expenditures in excess of budgeted amounts (budget overage).
        ii. Negative variances represent actual revenues or expenditures less than budgeted amounts (budget remaining).
    b. ~~*Report*~~ *Controls*: Fiscal is responsible for ensuring adequate review controls are in place to ensure the integrity of the budget-to-actual amounts presented in the Budget Monitor~~ing Report~~. A reconciliation of the totals will be performed, with reference to the actual amounts recorded in ~~the Axiom Grants Module~~Colleague, to ensure all revenues and expenses for each grant were captured correctly. This reconciliation and review will be documented, and that documentation will be retained in the Fiscal grants file. This review will always be performed prior to report distribution.

c. *Timeline ~~for Reports~~*: Fiscal Services should produce the Budget Monitor~~ing Report~~ on ~~at least~~ a monthly basis, and as requested by the PI or required by the funder, for each active grant. The monitoring reports are produced after indirect costs, payroll/benefits, and all accruals have been posted.

d. *Distribution*: ~~Reports~~ Budget Monitors should be distributed, via email, to all PIs and OSP for review on a monthly basis.

~~d.~~e. *Review*: The PI, with support from OSP as required, should review the Budget Monitors for their grants and notify Fiscal of any errors or omission as soon as the PI is aware of UC Law SF errors, e.g., as a result of preparing reports for funders or in connection with regular College budget review processes.

~~e. *Review*: The PI, with support from OSP as required, must review the Budget Monitoring Reports for their grants and notify Fiscal of any errors or omission as soon as the PI is aware of such errors, e.g., as a result of preparing reports for funders or in connection with regular College budget review processes.~~

2. Correcting Errors: If errors are noted and corrections are required in the Budget Monitor, the PI and Fiscal, with support from OSP and HR as required, should coordinate to process any necessary expense reclassifications or other related actions. Fiscal should then update the Report to reflect any corrective actions and redistribute to the PI and OSP for inclusion in the Fiscal and PI/OSP grants file. In the event that the incorrect Budget Monitor ~~Report~~ was previously provided to the project sponsor, Fiscal will ensure that the corrected Budget Monitor ~~Report~~ is promptly transmitted to the project sponsor.

~~3. Axiom Grants Module: The Axiom Grants Module was developed to expand on the Axiom Budget Module, which is used for the College's fiscal year budgeting processes and provide a customized tool for developing and tracking grant budgets. Similar to the Budget Monitoring Report, the Grants Module bridges gaps between the College's fiscal year (July 1 through June 30) and the various periods/grant years required based on specific grant funding requirements, allowing individual grant budgets to be integrated with the College's fiscal year budgeting processes.~~

~~To this end, the Grants Module allows for development of budgets extending beyond a single fiscal year and the system directly interfaces with Colleague, inputting data on a daily basis to record grant expenditures, enabling ongoing monitoring and management of actual and projected grant expenditure throughout the life of a grant.~~

H. Grant Reporting

1. Financial/Technical Grant Reporting: Funders/grantors require quarterly, annual and/or final financial, technical (narrative), and other reports. The specific reporting requirements and the applicable due dates for these reports should be stated in the grant award or grant contract. Final reports may be due between 30 and 90 days after the end-date of the award, depending on the funder/grantor requirements. The award may also require other periodic progress reports.

With support from Fiscal and ~~and~~ OSP as required, the PI is ultimately responsible for tracking all reports required under a grant, and the applicable due dates. As detailed below, if the PI does not have sufficient capacity/support to independently produce and submit financial reports, Fiscal can prepare and submit financial reports to the sponsor. For ~~suc~~ h ~~-~~financial reports, the PI should contact Fiscal at least two weeks in advance to initiate preparation of the report. For technical and other reports, the PI is responsible for preparing the reports, with support and inputs from Fiscal and OSP, as required. Once prepared, the PI is independently responsible for submitting all required non-financial reports directly to the sponsor prior to the applicable grant reporting deadlines; as noted, if requested by the PI, Fiscal will submit required financial reports.

2. Fiscal Support for Financial Reporting: Following the award of a new grant, ~~During the kick-off meeting for each grant,~~ the PI, with support for Fiscal and OSP as needed, should develop a ~~a~~ reporting ~~submission~~ schedule should be developed for all required financial reports and any reports requiring inputs from Fiscal for the grant, along with the due dates. If requested by a PI who lack sufficient capacity/support, Fiscal will independently monitor financial reporting requirements, produce financial reports for review by the PI, and, following PI review, submit financial reports to the sponsor.

3. Report Approval and Submission: If requested by the PI, Fiscal will provide financial reports to the PI for review. The PI is responsible for reviewing any financial reports provided by Fiscal and for preparing all non-financial reports. For any financial reports produced for the PI, Fiscal is responsible for approving the financial reports. If requested by the PI and following PI review, Fiscal will submit the required financial report, prior to the due date, to the sponsor. The PI is responsible for approving and submitting all non-financial reports and any financial reports produced independently of Fiscal.

   Final financial reports should be submitted in accordance with the reporting due dates in the applicable grant agreement. If the grant agreement does not specify a submission due date for the final financial report, the report should be submitted no later than 90 days after the end-date of an award to submit the final financial report, per the College's standard practice.

   It is ultimately the PI's responsibility (in partnership with Fiscal, as indicated above) to ensure timely submission of all required reports to the sponsor. Failure to comply with reporting deadlines may result in the recall, reduction, delay, or discontinuation of payments under the grant, early termination of the grant, and/or negatively impact future funding to the College.

4. Record Retention: All reports submitted to a sponsor, along with any supporting documentation and review documentation, must be saved in the applicable Fiscal and PI/OSP grant files to support compliance.

I. Grant Closeout

1. The PI and Fiscal will work together, with support from OSP as required, to ensure grant closeout is performed appropriately and timely following the close of a grant. The following are considerations that should be made for grant closeout:
   a. Ensuring all final costs related to the grant have been recorded in the general ledger.

b. Assessing all existing accruals for accuracy and ensuring the timely resolution of the related deferred revenue or grant receivable.
c. Determining if all final grant reporting requirements have been met.
d. Assessing the grant compliance requirements for closeout requirements.
e. Deactivating (closing) the grant fund in Colleague to prevent any incorrect future postings to the funder.

2. The Fiscal and PI/OSP grant files should be marked as "closed" and maintained in accordance with the College's record retention policies, or the grant requirements, whichever is longer.

16.0 Grants Management

Policy # 16.0

Subject: **Grants Management**

Internal Policies and Procedures
of University of California College of Law, San Francisco

Effective Date: March 11, 2021
Revision Dates: August 4, 2025

Purpose:

The purposes of these policies are: (1) to establish grants management responsibility and workflow;[1] (2) to ensure that the financial and accounting aspects of the grants management function within the University of California College of Law, San Francisco ("UC Law SF" or the "College") are well managed, performed consistently, and adequately documented; and (3) to ensure that financial information is available in a consistent and reliable format for those responsible for managing grant-funded programs.

Scope:

These policies apply to all employees involved in any activity related to the management of grants (public, private, or other) obtained by UC Law SF. These policies also apply to those seeking and obtaining grants that are providing financial information to, or obtaining financial information from, the Office of Fiscal Services. Because grants management is interdepartmental, and because departmental procedures are intertwined, these policies affect processes in departments in addition to the Office of Fiscal Services and thus were developed collaboratively with the Provost & Academic Dean's Office (including the Office of Sponsored Projects), Academic Program Services, Human Resources, Office of Advancement, and the Office of General Counsel. Other College policies also affect grants administration and should be consulted regarding various aspects of grants, including human resources, intellectual property, conflicts of interest, and research conduct issues.

Throughout this document, words like "must" and "should" are used. When the term "must" is used, no group or individual has the authority to deviate from the specific policy or procedure, unless authority is specifically provided or delegated in accordance with the terms of this policy. The term "should" is used to convey that individuals are expected to follow the policy and procedures as written and are required to justify any deviations. Deviations should only occur when the specifics of the situation justify a reasonable departure from the recommended policy and procedures.

Definitions:

The definitions below define standard wording referred to throughout UC Law SF's Policies and Procedures and apply to all instances where a word/phrase is used.

- Approved College Center: A center that has been approved by the Chancellor & Dean or Provost & Academic Dean, for which the College has appointed a director or co-directors, and which has been allocated a budget. Research Centers as defined in the Faculty Rules are one type of Approved College Center.

[1] Throughout this document, the term "grant" is used expansively to refer to any external funding source for any third-party-sponsored project.

- Principal Investigator (PI): The UC Law SF employee that is designated as the oversight authority for managing a specific grant-funded project.
- Fiscal: The Office of Fiscal Services or Finance Department within UC Law SF.
- Office of Sponsored Projects (OSP): The Office of Sponsored Projects within the Provost & Academic Dean's Office that supports UC Law SF employees in obtaining and managing sponsored (i.e., externally-funded) projects.
- Office of Human Resources (HR): The Office of Human Resources within UC Law SF.
- Office of General Counsel (OGC): The Office of General Counsel within UC Law SF.
- Provost & Academic Dean's Office (ADO): The Office of the Provost & Academic Dean within UC Law SF.
- Chief Financial Officer (CFO): The Chief Financial Officer of UC Law SF.
- Advancement: The Office of Advancement within UC Law SF.
- Colleague: The Colleague system is utilized by UC Law SF for all financial and accounting functions.
- UCPath: The UCPath system is the system of record for payroll, benefits, and human resource (HR) related employment information.

I. Roles and Responsibilities

A. PI Responsibilities: With support from Fiscal and OSP, the PI is responsible for the following activities for all grants that they oversee:
   1. Developing a detailed budget, that correlates with the account structure available in the Fiscal system and permitted by the sponsor.[2]
   2. Reviewing and approving the established budget and working with OSP to obtain necessary internal reviews/approvals, prior to submission of the grant proposal.
   3. Reviewing and approving the grant agreement and working with OSP to obtain necessary internal reviews/approvals, prior to execution of the agreement and entry of the budget into Colleague.
   4. Monitoring budget to actual expenditures throughout the term of the grant and addressing any potential overages or spending concerns as soon as possible.
   5. Monitoring and approving all expenditure activity and ensuring that all costs charged to a grant are adequately supported, including salary and benefit allocations.
   6. Ensuring all reporting grant requirements are adhered to and working with Fiscal & OSP to ensure that financial and performance reports submitted are accurate and submitted in accordance with grant deadlines.
   7. Ensuring all required documents, reports, and support are saved in a designated grant file on the UC Law SF server and/or online database (e.g., Box.com, OneDrive).

B. Fiscal Responsibilities: Fiscal is responsible for the following financial activities for all UC Law SF grants:
   1. In coordination with OSP, working with PI to establish a detailed budget that correlates with the account structure available in Colleague, including providing assistance to the PI to ensure that budgeted costs are correctly categorized.
   2. Reviewing and approving proposal budgets prior to submission to ensure compliance with UC Law SF Fiscal policies.

[2] The terms "funder," "sponsor," and "grantor" are used interchangeably throughout this document.

3. Reviewing and approving grant agreements prior to execution to ensure the grant budget aligns with the grant agreement and complies with UC Law SF Fiscal policies.
4. Entering the budget into Colleague and ensuring a review is performed by a separate Fiscal employee to ensure the budget entered ties to the underlying budget approved by the PI and the project sponsor.
5. Preparing, and ensuring the accuracy of, Budget Monitors to present timely budget to actual data, by grant, on a monthly basis.
6. Reviewing all grant expenditures requested (purchasing) and submitted for payment (accounts payable processing) for the reasonableness of coding, appropriate supporting documentation, and proper approval.
7. Processing approved funding changes in UCPath.
8. Initiating reclassifications of expenses through the Transaction Reclassification and Correction form (non-salary expenses), or through a Salary Cost Transfer in UCPath (salary expenses).
9. Providing resources and assistance to the PI in the preparation of financial reports for grant requirements and for establishing an internal review process to verify the accuracy of all reports prior to submission to the funder and submitting required budget reports to funders in coordination with the PI.
10. Setting up the initial grant file, labeling it appropriately, and monitoring the contents for completeness of grant records.

C. OSP Responsibilities: OSP is responsible for the following financial activities for all UC Law SF grants:
    1. In coordination with Fiscal, working with PIs to develop a detailed proposal budget, that correlates with the account structure available in the Fiscal system including providing assistance to the PI to ensure that budgeted costs are correctly categorized.
    2. Reviewing and approving all letters of interest ("LOIs", also known as "letters of intent", "pre-proposals", "statements of interest", or other similar terms)[3].
    3. Reviewing all project grant proposals (e.g., narrative, budget, and other supporting documentation) and working with the PI to obtain necessary internal reviews/approval prior to submission of the grant proposal.
    4. Reviewing all grant agreements and working with PI to obtain necessary internal reviews/approval prior to execution of the agreement.
    5. As required, supporting PI's unaffiliated with mature Research Centers with the following:
        a. Monitoring budget to actual expenditures throughout the term of the grant and addressing any potential overages or spending concerns as soon as possible.
        b. Monitoring and approving all expenditure activity and ensuring that all costs charged to a grant are adequately supported, including salary and benefit allocations.

[3] Grant solicitations often involve a multi-stage application process, beginning with the submission of an LOI, which typically include basic information on the applicant and its request for funding, but do not include detailed financial information (e.g,, salaries, fringe benefit rates, indirect cost rates, etc.) and do not impose any legal/financial obligations on the applicant. Under this policy, LOIs that (1) do not include detailed financial information, 2) do not impose any legal obligations on the College, and (3) OSP determines generally align with UC law SF academic mission/values and grants policies do not require review/approval by ADO or Fiscal.

c. Ensuring all reporting grant requirements are adhered to, and working with Fiscal to ensure that financial and performance reports submitted are accurate and submitted by the due date.
d. Ensuring all required documents, reports, and support are saved in the applicable grant file on the UC Law SF server and/or online database (e.g., Box.com, OneDrive).

6. In coordination with Advancement, supporting fundraising efforts and ensuring both grant and non-grant funding to the College is properly categorized and managed, in accordance with relevant UC Law SF policies/procedures.

D. HR Responsibilities: HR is responsible for the following financial activities for all UC Law SF grants:
1. Supporting OSP and Fiscal during the budget establishment process to ensure salaries, benefits, stipends, staffing allocations, and other HR-related items are properly included in grant budgets in accordance with UC Law SF HR policies and records.
2. Responding to questions about to ensure grants budgets are properly prepared and recorded.
3. In coordination with PIs, drafting and executing offer letters, appointment modifications, and other staffing related documents for grant-funded personnel. Maintaining executed agreements, approved modifications, and other staffing related documents in personnel folders.
4. In coordination with PIs, OSP, and Fiscal, setting up grant-funded personnel in the UC Path system and (as necessary) processing adjustments to grant-funded salaries, benefits, staffing allocations, and other payroll-related items.
5. In coordination with PIs, OSP, and Fiscal, helping ensure salaries, benefits, stipends, staffing allocations, and other HR-related items are properly included in grant reporting in accordance with UC Law SF HR policies and records and sponsor requirements.

E. OGC Responsibilities: OGC is responsible for the following activities for all UC Law SF grants:
1. Reviewing and approving all grant agreements, contracts, and other grant-related legal documents which will be signed on behalf of the College prior to execution to ensure compliance with applicable laws, regulations, and policies.
2. As required, supporting PIs and OSP to develop sub-grants, subcontracts, or other relevant legal documents.
3. Identifying provisions of grant agreements that may be inconsistent with applicable laws, regulations, and policies or other institutional considerations. For instances where resolution of UC Law SF issues with the PI cannot be achieved to the satisfaction of OGC, the Provost & Academic Dean and CFO are advised, with ultimate decision-making authority resting with the Chancellor & Dean.

F. ADO Responsibilities: ADO is responsible for the following activities for all UC Law SF grants:
1. Reviewing and approving all grant proposals prior to submission to ensure compliance with UC Law SF academic mission and values and faculty member staffing and compensation policies in the Faculty Personnel Manual.
2. Reviewing and approving all grant awards prior to execution to ensure compliance with UC Law SF academic mission and values and faculty member staffing and compensation policies in the Faculty Personnel Manual.

3. Reviewing PI requests for exemption from Institutional Review Board (IRB) review, as applicable, and, in coordination with the PI and OSP, maintaining records related to that process for the applicable retention period.

G. CFO Responsibilities: CFO has primary responsibility for managing the College's finances, including financial planning, management of financial risks, record-keeping, and financial reporting to internal and external parties.

H. Advancement Responsibilities: Advancement is primarily responsible for leading the College's efforts to secure and manage non-grant funding through cash, stock and check donations, endowments, scholarship support, sponsorships, foundations, non-profits, corporations, and other entities. Given the potential overlap between Advancement donors and prospects and grant donors, OSP and Advancement work collaboratively to support fundraising efforts and ensure both grant and non-grant funding to the College is properly categorized and managed, in accordance with relevant UC Law SF policies/procedures.

I. Delegation of Authority: Unless specifically prohibited within this policy, authority to complete and approve the responsibilities/procedures detailed in this policy may be delegated for (a) any grant allocating general operating funds with a total value of under $100,000 and (b) any other non-federal grant with a total value of under $100,000. All delegations of authority must be documented in writing and approved by the CFO.

J. If users of this policy have any questions on the requirements or procedures, they should contact the PI, Fiscal, or OSP for guidance.

II. Procedures

A. Pre-Award Budget Procedures

1. Budget Preparation: With support from Fiscal and OSP, as required, the PI must prepare a detailed proposal budget, along with relevant supporting documents (e.g., budget narrative, biosketch, etc.), that complies with sponsor requirements and UC Law SF policies and procedures.

2. Budget Review and Approval: The PI must approve the proposal budget and submit it, along with the full grant proposal (e.g., narrative, budget, supporting documents), to OSP for review **at least 6 business days** prior to the sponsor's deadline. OSP must review the budget and full grant proposal and submit to the Fiscal & ADO for review. Fiscal & ADO must approve the full grant proposal prior to submission.

3. Budget Submission: Upon approval from Fiscal, OSP shall submit the budget, along with the full grant proposal to the sponsor. Alternatively, the PI (or designated staff) may directly submit a grant proposal once all necessary internal approvals have been obtained and OSP has authorized the proposal for submission.

B. Post-Award Procedures

1. Award Notification: Upon receiving a notification of award, the person receiving notice must notify OSP, and OSP should notify the PI (if necessary), Fiscal, and OGC of the incoming award and submit the award documents, including the grant agreement, budget, and all other supporting documents to the PI for review. Once the PI has completed their review, OSP should send the award documents to the ADO, OGC, and Fiscal for review.

2. Internal Review and Approval of Grant Award: The PI must approve the award to ensure the statement of work and budget are appropriate and align with the submitted proposal and coordinate with OSP to obtain review of the award and grant agreement from the ADO, OGC, and Fiscal. OSP must coordinate with the PI, ADO, OGC, Fiscal, and the sponsor to address any changes to the budget or other award documents during the contracting process. The ADO and OGC must review the award and, following their review, Fiscal must approve the final grant award.

3. OGC Review and Approval of Grant Agreements: All grant agreements, contracts, and other grant-related legal documents which will be signed on behalf of the College are subject to review and approval by OGC prior to execution. Notwithstanding Article I.H., delegation of OGC approval authority is prohibited.

4. Board Review: Grants and other awards may be subject to review and require approval by the UC Law SF Board of Directors, as indicated in the relevant governing documents.

   For all awards requiring Board approval, authorization must also be obtained prior to execution of the relevant award document.

   For awards over $100,000 that do not require Board approval, the award shall be reported to the Board Finance Committee at the next regularly scheduled meeting after receipt of the awarded funds. The dollar threshold for requiring the reporting of awards to the Board Finance Committee may be increased as UC Law SF thresholds are adjusted by the Board of Directors. Pursuant to Article I.H., delegation of Board approval authority is prohibited.

5. IACUC Review: For grants involving animal subjects, Institutional Animal Care and Use Committee (IACUC) review must be obtained prior to start of grant activities. IACUC review authority may not be delegated.

6. IRB Review: For grant projects involving human subjects, IRB review must also be obtained prior to start of grant activities. All other IRB matters are covered by separate policies. Faculty conducting human subject research need to refer to, be knowledgeable about, and comply with those procedures. IRB review authority may not be delegated.

7. Award Execution: Following all relevant reviews and approvals (as detailed above), OSP must coordinate with OGC/Fiscal and the sponsor for execution of the grant agreement. The fully executed grant agreement, along with any supporting documents, must be forwarded to Fiscal for grant file setup and fund/ budget setup in Colleague, and to the PI and Procurement for filing in the appropriate grant or contract files.

8. Grant Kick-off Meeting (Optional): As appropriate, a grant kick-off meeting may be held between various UC Law SF stakeholders including the PI, Fiscal, OSP, and other individuals who will be involved with the grant at any functional level. Kick-off meeting may address:
    a. Designated roles and responsibilities including those related to budget monitoring, compliance reporting, expenditure processing and tracking, filing, etc.
    b. Compliance requirements applicable to the grant, and the expected assistance needed from Fiscal, OSP, or other support functions within UC Law SF.
    c. Any expected assistance needed from Fiscal, OSP, or other support functions of UC Law SF throughout the life of the grant that fall outside of the assigned responsibilities within this policy.

9. Grant Files: Fiscal and the PI/OSP must establish separate record-keeping systems to maintain final grant documents, including executed copies of all grant award notifications and contracts. Fiscal grant files must be established for each new award and should be accessible only by designated Fiscal staff involved in the grants management process. PI/OSP grant files must be established for each new award and should be accessible only by the PI, OSP, and other designated staff involved in the grant management process. All grant files should be accessible via the UC Law SF server and/or online database (e.g., Box.com, OneDrive).

    The following grant-related documents should be maintained in the Fiscal & PI/OSP grant files:
    a. Final grant proposal or grant application and all supporting forms.
    b. Award notification.
    c. All grant financial and other compliance-related reports submitted throughout the grant term.
    d. Final signed contract and any amendments.
    e. Budget Monitors and other performance reports used internally for grant monitoring.
    f. Correspondence from the funder/grantor.
    g. Documentation of approvals for report reviews required by this policy.
    h. Other key information related to the grant.

C. Budget Finalization

1. Budget Adaptation: Once the grant award is executed and submitted to Fiscal, Fiscal will arrange a meeting with the PI and OSP (as necessary) to discuss the budget included in the grant award and align the budget line items from the award with the categories available in the existing UC Law SF chart of accounts. The grant budget must be translated to conform with the College line-item budget categories for Fiscal to set up an account/fund for the award. Fiscal will assist with translating this information back into funder-required budget formats, as required for reporting.

2. Finalizing the Budget: Fiscal will review the final budget before execution of the grant agreement and verify that in total, it reconciles to the award, appears reasonable and achievable, and that the line-items tie to the College's account structure.

D. Fund and Budget Setup

1. Fund Setup: Upon receipt of a fully executed grant agreement, Fiscal will set up the fund in Colleague based on the grant award and budget and work with the PI and OSP if any additional information or clarification is required. Fiscal will notify the PI and OSP once the fund is set up.

2. Budget Entry: Once the fund is established, Fiscal will enter the budget based on the finalized budget, ensuring the proper Budget Officer is assigned. Fiscal will ensure that an independent review of the budget entered into Colleague is performed by an individual not involved in the initial entry. This review will ensure that the budget entered ties, by individual line item, to the amounts presented in the final budget submitted to Fiscal and approved by the PI and project sponsor. This review will be documented and retained in the Fiscal grant files.

E. Incurring Expenditures and Paying Invoices

1. Incurring Grant Expenditures: All grant-related purchases and expenditures are subject to the standard College purchasing and expenditure policies and procedures. However, when a purchase is anticipated to be funded with a grant, additional scrutiny is required.
    a. PI Responsibilities: The PI is ultimately responsible for:
        i. Understanding allowable costs under the grant terms and other applicable rules in order to specifically distinguish which costs can be charged to the grant and which cannot.
        ii. Reviewing each purchase request that relates to the use of grant funds to ensure it is allowable.
        iii. Reviewing each invoice received from vendors and approving it for payment. A detailed review of the invoice charges must be performed, and confirmation must be documented that the related full expense should be charged to the grant.
        iv. Ensuring that all costs incurred under an award are charged directly to the appropriate award account, fund number, sub account (if applicable) and object codes, as they are incurred.
        v. Ensuring that all payroll-related expenses are adequately documented and supported, including all allocation methodologies applied. This allocation support should be kept current and should be provided to Fiscal prior to incurrence of the related payroll expense whenever possible to prevent the need for reclassing of payroll expenses.
        vi. Submitting any funding or staffing adjustments and retroactive salary reclassifications in a timely manner to HR and Fiscal. Appointment and compensation adjustments are subject to College-wide policies.
    b. Fiscal Services Responsibilities: Fiscal is responsible for the following as it relates to grant expenditures:
        i. Processing vendor and sub-awardee payments and payroll. If adequate supporting documentation or required approvals are not submitted, Fiscal will follow-up with the responsible PI.
        ii. Ensuring all supporting documentation for vendor payments and payroll-related expenditures is maintained in an organized manner to support the amounts being charged to individual grants.
        iii. Reviewing payroll-related allocations at a high level to ensure they appear reasonable and supported by an underlying calculation. Fiscal will file

(electronically) the support for payroll allocations and any reclass entries processed.

iv. Processing funding changes communicated by the PI and initiating salary cost transfers (SCT) to adjust retroactive payroll expenses in UCPath.

v. Calculating and recording any indirect cost rates applied to each grant. Documentary support for the indirect cost rate calculation and expense entries should be included in the Fiscal grant file to record the expense to applicable grants.

c. OSP Responsibilities: OSP is responsible for the following as it relates to grant expenditures:

i. Providing support and guidance to PIs and Fiscal regarding the compliance requirements related to allowable costs for the grant.

ii. As required, providing support and guidance to PIs, Fiscal, and HR regarding any of the above-listed responsibilities related to grant expenditures.

d. HR Responsibilities: HR is responsible for the following as it relates to grant expenditures:

i. Providing support and guidance to PIs and Fiscal regarding payroll, benefits, and other staffing-related issues to ensure compliance with UC Law SF HR policies.

ii. As required, processing and approving staffing adjustments and retroactive salary reclassifications submitted by the PI.

2. Compliance Supporting Documentation: The supporting documentation required to show compliance with grant expenditure requirements is dependent on the type of expenditure and the terms and conditions of the grant. The PI and Fiscal, with support from OSP and other departments as required, must assess the compliance requirements for each grant to ensure the required supporting documentation is submitted and included in the relevant grant files. These requirements should be discussed during the grant kick-off meeting to ensure all expenditures are adequately supported.

F. Grant Payment Requests (Invoicing)

1. The PI and Fiscal, with support from OSP as required, must monitor grant periods of performance and grant expenditures. This monitoring should include developing schedules for submission of invoices to the sponsor and tracking actual expenses incurred, projected expenses, and remaining grant periods to ensure expenditures are appropriately planned and incurred to ensure completion of the grant scope of work within available budget and time limitations. Fiscal should serve as a resource for developing customized reports to monitor grant expenditures.

2. Fiscal Services Responsibilities: Fiscal Services is responsible for:
   a. Monitoring grant invoicing schedules and preparing and submitting all invoices to sponsors in a timely manner in accordance with the terms of the grant;
   b. Ensuring the PI provides adequate supporting documentation for each expense included in an invoice and attaching it to the invoice, as required;
   c. Ensuring all billing and financial reporting is completed in accordance with the terms and conditions of the applicable grant agreement;
   d. Recording all journal entries to record grant receivable and deferred revenue activity and maintaining supporting documentation for all entries;

e. Coordinating with the PI if there are any questions during the invoicing/billing process.

G. Budget to Actual Monitoring

1. Budget Monitor: The Budget Monitor was developed to assist PIs, Fiscal, and OSP to monitor grant expenditures, to help bridge gaps between the College's fiscal year (July 1 through June 30), which the Colleague system applies for all revenue and expenditure reporting, and the various periods/grant years required based on specific grant funding requirements, and to provide additional customizability and functionality in grant tracking and reporting for PIs, Fiscal, and OSP.
    a. *Content*: The Budget Monitor will show, for each active grant, revenues, expenditures, and projections in a budget-to-actual presentation. The budget-to-actual amounts will be presented by object code (line item) to present variances between available grant funds and total expenditures and projections.
        i. Positive variances represent actual revenues or expenditures in excess of budgeted amounts (budget overage).
        ii. Negative variances represent actual revenues or expenditures less than budgeted amounts (budget remaining).
    b. *Controls*: Fiscal is responsible for ensuring adequate review controls are in place to ensure the integrity of the budget-to-actual amounts presented in the Budget Monitor. A reconciliation of the totals will be performed, with reference to the actual amounts recorded in Colleague, to ensure all revenues and expenses for each grant were captured correctly. This reconciliation and review will be documented, and that documentation will be retained in the Fiscal grants file. This review will always be performed prior to report distribution.
    c. *Timeline*: Fiscal Services should produce the Budget Monitor on a monthly basis, and as requested by the PI or required by the funder, for each active grant. The monitoring reports are produced after indirect costs, payroll/benefits, and all accruals have been posted.
    d. *Distribution*: Budget Monitors should be distributed, via email, to all PIs and OSP for review on a monthly basis.
    e. *Review*: The PI, with support from OSP as required, should review the Budget Monitors for their grants and notify Fiscal of any errors or omission as soon as the PI is aware of UC Law SF errors, e.g., as a result of preparing reports for funders or in connection with regular College budget review processes.

2. Correcting Errors: If errors are noted and corrections are required in the Budget Monitor, the PI and Fiscal, with support from OSP and HR as required, should coordinate to process any necessary expense reclassifications or other related actions. Fiscal should then update the Report to reflect any corrective actions and redistribute to the PI and OSP for inclusion in the Fiscal and PI/OSP grants file. In the event that the incorrect Budget Monitor was previously provided to the project sponsor, Fiscal will ensure that the corrected Budget Monitor is promptly transmitted to the project sponsor.

H. Grant Reporting

1. Financial/Technical Grant Reporting: Funders/grantors require quarterly, annual and/or final financial, technical (narrative), and other reports. The specific reporting requirements and the

applicable due dates for these reports should be stated in the grant award or grant contract. Final reports may be due between 30 and 90 days after the end-date of the award, depending on the funder/grantor requirements. The award may also require other periodic progress reports.

With support from Fiscal and OSP as required, the PI is ultimately responsible for tracking all reports required under a grant, and the applicable due dates. As detailed below, if the PI does not have sufficient capacity/support to independently produce and submit financial reports, Fiscal can prepare and submit financial reports to the sponsor. For financial reports, the PI should contact Fiscal at least two weeks in advance to initiate preparation of the report. For technical and other reports, the PI is responsible for preparing the reports, with support and inputs from Fiscal and OSP, as required. Once prepared, the PI is independently responsible for submitting all required non-financial reports directly to the sponsor prior to the applicable grant reporting deadlines; as noted, if requested by the PI, Fiscal will submit required financial reports.

2. Fiscal Support for Financial Reporting: Following the award of a new grant, the PI, with support for Fiscal and OSP as needed, should develop a reporting schedule should be developed for all required financial reports and any reports requiring inputs from Fiscal for the grant, along with the due dates. If requested by a PI who lack sufficient capacity/support, Fiscal will independently monitor financial reporting requirements, produce financial reports for review by the PI, and, following PI review, submit financial reports to the sponsor.

3. Report Approval and Submission: If requested by the PI, Fiscal will provide financial reports to the PI for review. The PI is responsible for reviewing any financial reports provided by Fiscal and for preparing all non-financial reports. For any financial reports produced for the PI, Fiscal is responsible for approving the financial reports. If requested by the PI and following PI review, Fiscal will submit the required financial report, prior to the due date, to the sponsor. The PI is responsible for approving and submitting all non-financial reports and any financial reports produced independently of Fiscal.

   Final financial reports should be submitted in accordance with the reporting due dates in the applicable grant agreement. If the grant agreement does not specify a submission due date for the final financial report, the report should be submitted no later than 90 days after the end-date of an award to submit the final financial report, per the College's standard practice.

   It is ultimately the PI's responsibility (in partnership with Fiscal, as indicated above) to ensure timely submission of all required reports to the sponsor. Failure to comply with reporting deadlines may result in the recall, reduction, delay, or discontinuation of payments under the grant, early termination of the grant, and/or negatively impact future funding to the College.

4. Record Retention: All reports submitted to a sponsor, along with any supporting documentation and review documentation, must be saved in the applicable Fiscal and PI/OSP grant files to support compliance.

I. Grant Closeout

1. The PI and Fiscal will work together, with support from OSP as required, to ensure grant closeout is performed appropriately and timely following the close of a grant. The following are considerations that should be made for grant closeout:
    a. Ensuring all final costs related to the grant have been recorded in the general ledger.
    b. Assessing all existing accruals for accuracy and ensuring the timely resolution of the related deferred revenue or grant receivable.
    c. Determining if all final grant reporting requirements have been met.
    d. Assessing the grant compliance requirements for closeout requirements.
    e. Deactivating (closing) the grant fund in Colleague to prevent any incorrect future postings to the funder.

2. The Fiscal and PI/OSP grant files should be marked as “closed” and maintained in accordance with the College’s record retention policies, or the grant requirements, whichever is longer.

ACTION ITEM

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

2. SUBJECT: Academic Village – Letter of Intent with SF State University

3. BACKGROUND:

UC Law San Francisco ("UC Law SF") and San Francisco State University ("SF State") are in the process of finalizing a non-binding Letter of Intent ("LOI") to transition three academic programs from SF State's downtown campus to the UC Law SF campus beginning in Fall 2026. The programs included are the College of Professional & Global Education ("CPAGE"), the College of Business ("COB"), and the Master of Public Administration ("MPA"). The programs that are relocating to UC Law SF have all opted to colocate with UC Law SF due to the criticality of remaining proximate to downtown, technology companies, and mass transit. SF State also considered including the Osher Lifelong Learning Institute ("OLLI") but due to significant scheduling demands and limited financial capacity, OLLI will instead relocate to SF State's main campus.

SF State's use of the UC Law SF campus will include dedicated spaces that SF State rents from UC Law SF subject to a standard lease as well as use of shared classrooms subject to a license agreement following the UC Davis model, with per-use fees and scheduling coordination through UC Law SF's Academic Programs team. The proposed dedicated spaces are between 3,000 and 5,000 square feet contingent upon whether they will need a computer lab and/or their need for specialized equipment. The locations under consideration are two empty shell classrooms and a shelled office suite on the 2nd floor of 198 McAllister along with a shelled space on the 2nd floor of 200 McAllister, which is located next to the UC Davis office suite and originally served as the Health Center for UC Law SF. The determination of exactly how much space is needed and how it will be outfitted will result from the design process that will follow execution of the non-binding LOI.

The non-binding LOI, see attached[1], is currently under review by the CSU system-wide Chancellor's Office in Long Beach, with a deadline for execution of September 30, 2025. UC Law SF is requesting SF State's commitment as soon as possible to ensure adequate time for design, permitting, and build-out with delivery of the dedicated space to occur by July 1, 2026. The initial lease term is expected to be a minimum of five (5) years with a preference for seven (7) years given the tenant improvement costs, which will be determined during the design process.

Estimated annual revenues will depend upon the final determination of the total dedicated space as well as the final scheduling needs for CPAGE, COB, and MPA, which UC Law SF will determine through the design and programming exercise as well as coordination between SF State and UC Law SF course schedulers following execution of the non-binding LOI. However,

[1] Note that the draft non-binding LOI was sent to SF State in June 2025, and the further programming discussions have already resulted in changes to the amounts listed in the draft LOI. UC Law SF will finalize all costs and terms in advance of execution of the binding agreement between SF State and UC Law SF.

initial estimates range between $370,000 and $750,000 in annual revenue from SF State's colocation on the UC Law SF campus.

Finally, UC Law SF is working on engagement and scope with Page architects, who is an existing vendor for the College working on space planning needs. Once the design is complete, the College will bid out the construction work.

4. RECOMMENDATIONS:

This item requests the UC Law SF Board of Directors' approval of a non-binding Letter of Intent with San Francisco State University to relocate the College of Professional & Global Education, College of Business, and Master of Public Administration programs to UC Law SF's campus beginning Fall of 2026.

Attachment: Draft Unexecuted Non-Binding LOI between UC Law SF and SF State for Colocation of SF State Programs at the UC Law SF Campus

June 16, 2025

[SF State Recipient]
San Francisco State University
1600 Holloway Avenue, San Francisco, CA 94132

Re: Letter of Intent for San Francisco State Participation in UC Law SF's Academic Village

Dear [SF State Recipient]:

Thank you for your expression of interest in becoming a participant in the University of California, College of the Law, San Francisco ("UC Law SF" or "Landlord") Academic Village. UC Law SF is pleased to submit the following non-binding letter of intent to lease dedicated space and to enter into a facilities license and usage agreement for shared classroom use on the UC Law SF campus. This letter reflects UC Law SF's interest in establishing a collaborative academic presence for San Francisco State University ("SF State" or "Tenant") as an Academic Village partner. This is not a contract on the part of the undersigned party but is an expression of interest in entering into a lease agreement and a related classroom license agreement ("Agreements") upon the general terms and conditions set forth herein, subject to reasonable and good faith negotiations, and final Agreements.

1.	Landlord	University of California, College of the Law, San Francisco.
2.	Tenant	San Francisco State University.
3.	Premises	Approximately 1,900 rentable square feet comprised of two classrooms located on the second floor of 198 McAllister Street, approximately 1,200 rentable square feet in Suite 202 on the second floor of 200 McAllister Street in San Francisco, California for a computer lab, and approximately 1,200 square feet in Suite 250 on the 2nd floor of 198 McAllister Street as a San Francisco State administrative office. This is approximately 4,300 square feet of dedicated San Francisco State programmatic and office space.
4.	Use	Tenant shall be permitted to use the Premises for activities in pursuit of Tenant's mission of higher education and other related and conforming uses. In addition to its use of the Premises as set forth above, Tenant shall have the non-exclusive right to access and use all common areas including the dining areas, Quad, the library, study rooms, common area amenities, and social spaces during normal operating hours.
5.	Commencement Date	Upon substantial completion of improvements to the Premises but no later than August 1, 2026.
6.	Early Access	Tenant shall be entitled to 4 weeks early access to the Premises at no charge to Tenant prior to the Commencement Date for the installation of Tenant's furniture, fixtures, and equipment, provided that Tenant has delivered the fully executed Agreements, Security Deposit, certificates of insurance, any other applicable requirements specified in the Agreements, and provided such access does not materially interfere with Landlord's delivery of the Premises.
7.	Lease Term	The term of the Agreements shall begin upon the Commencement Date for a period of 60 months.

8.	Right to Renew	The Term of the Agreements may be extended by two (2) additional 12-month periods. In order to exercise extension options, Tenant shall provide Landlord with written notice of its desire to renew the Agreements at least 6 months prior to the expiration of the then-current Term.
9.	Base Rent	$60.00 triple net per rentable square foot per year or $258,000 per year with 3.0% annual increases at each anniversary of the Commencement Date. Rent for any renewal term shall also be increased annually by 3.0% at each anniversary of the Commencement Date.
10.	Shared Classroom Use	In addition to Tenant's exclusive use of the premises, Landlord and Tenant intend to enter into a separate, non-exclusive Facilities License and Usage Agreement to allow for Tenant's access to and use of shared classroom spaces on the UC Law SF campus. The scope of such shared classrooms use will be subject to mutual agreement, availability, and scheduling coordination. The parties will work in good faith to develop this agreement to support Tenant's academic programming needs in a manner consistent with the needs of UC Law SF's academic programming needs and with the goals of the Academic Village.
11.	Shared Use Rates	The Facilities License and Usage Agreement shall include a schedule of hourly and per-use rates. For Fall 2026, the rate for use of shared classrooms is set forth as Exhibit A. These rates shall be subject to an escalation of 3%, effective each subsequent UC Law SF fiscal year, which commences on July 1, unless otherwise mutually agreed upon in writing. Tenant shall be billed based upon reservation of classrooms for regular academic programming as determined in advance of the academic year, as well as on an ala carte per use basis for any additional uses outside of regular academic scheduling (e.g., events). All such uses shall be subject to availability, operational policies, and campus academic scheduling priorities of Landlord and Tenant.
12.	Condition of Premises	At the expiration of the Term or upon the effective date of any applicable early termination, Tenant shall deliver the Premises to Landlord in as good and clean condition and repair as it was prior to Tenant's use, subject to reasonable wear and tear.
13.	Operating Expenses	With respect to the Premises and common areas, Landlord will provide Tenant with its standard and customary building security, custodial services, utilities, and WIFI. Tenant will not be expected to reimburse Landlord for Landlord's insurance costs. Additional charges will be applied when Tenant's use of the Premises and/or common areas extend beyond approved schedule, scope, or standard operating hours. Any custodial or security services that Tenant requests above the standard and customary services that Landlord provides shall be the sole responsibility of Tenant, at its sole cost and expense. Tenant shall coordinate with and provide notice to Landlord, if it desires to contract directly with Landlord's vendors and service providers for such additional services. In the event that the Agreements creates a possessory interest subject to property taxation, and Tenant is subject to property tax levied on such interest, Tenant alone shall pay such tax. Tenant shall pay prior to delinquency all taxes assessed against and levied upon trade fixtures,

	furnishings, equipment and all other personal property of Tenant contained in the Premises or elsewhere on Landlord's campus. Tenant shall cause any such trade fixtures, furnishings, equipment and all other personal property to be assessed and billed separately from the real property of Landlord.
14. Parking	To the extent available, Tenant's students and employees shall be eligible to park in the campus parking garage located at 376 Larkin Street at the same parking rates and on the same terms as Landlord's students and employees.
13. Use of Name and Logo/Academic Village Branding	Each party shall have the right to use the name of the other party and factual information regarding the existence of the relationship that is the subject of the Agreements including use of Tenant's name and logo in materials describing and/or promoting the Academic Village and in lists of Academic Village participant institutions. In any such use, the relationship of the parties shall be accurately and appropriately described. Tenant will reference UC Law SF and the Academic Village in descriptions, publicity, and marketing of any programs or activities that it conducts using or relating to the Premises subject to Landlord's approval which shall not be unreasonably withheld, and in accordance with Landlord's branding guidelines.
14. Signage	Tenant will be encouraged to display approved signage at Tenant's sole cost and expense near the entrance to the Premises identifying it as the location of the Tenant program for the duration of the Agreements. The signage will be mutually agreed upon by Tenant and Landlord, and will include reference to Tenant's program at the UC Law SF Academic Village.
15. Right to Sublease	Tenant shall not have the right to sublease the Premises.
16. Tenant Improvements	Landlord, at Landlord's sole cost and expense, shall provide space planning assistance and deliver the Premises in a "turn-key" condition subject to a mutually agreed-upon final space plan to be attached as an exhibit to the Agreements.
17. Code Compliance	As of the Commencement Date, Landlord shall be responsible for all costs of compliance with current government rules and regulations. Tenant shall be responsible for code compliance costs, including but not limited to, Title- 24-related and ADA-related costs triggered by (i) initial improvement at Tenant's request whether completed by Landlord or not, (ii) alterations by Tenant, or (iii) Tenant's use or occupancy of the Premises. Tenant shall continue to be responsible for ongoing compliance within the Premises.
18. Brokers	Landlord and Tenant are not using third party brokers for this transaction and no broker or other person shall be entitled to any commission related to this transaction, and Landlord and Tenant shall defend and indemnify the other against any such claims.
19. Rules and Regulations	Tenant shall comply with Landlord's standard rules, regulations and requirements and any modifications thereon established by Landlord at the Premises including the UC Law SF standard contractual requirements. Tenant shall enforce its student code of conduct for its students and its

employee code of conduct for its employees at all times.

20.

This letter of intent is intended to be a non-binding statement of the terms of a proposed transaction and to reflect the parties' interest in pursuing further negotiations concerning the Premises. It is subject to the preparation and Agreements by the parties and their respective counsel of documents reflecting the terms and conditions set forth herein. No Agreements shall bind either party until a full and final written Agreements is prepared, reviewed, and approved by the parties and their respective counsel and is fully and mutually executed by the parties hereto. The Regents of the University of California, a public corporation, is not a party to this letter of intent.

Each party acknowledges that it may have incurred and may continue to incur transaction costs associated with the pursuit of the transaction described in this letter of intent, that such costs are incurred at such party's sole cost and sole risk, and that either party may terminate the negotiations at any time without liability or obligation to the other party.

Sincerely,

David Seward
Chief Financial Officer

Read and Approved:

_____ Date: _____

ACCEPTED AND AGREED:
Authorized Agent of San Francisco State University

By: _____

Name: _____

Title: _____

Date: _____

EXHIBIT A – Shared Classroom Non-Exclusive Use Rates

	UC Law SF - DRAFT for SF State			
	PRELIMINARY -- ROOM USE FEES (Fall 2026) SUBJECT TO CHANGE			
SPECIAL FACILITIES				
Facility Name	Location	Max Cap	Half Day Rate	Full Day Rate
Auditorium	198 Academe (198 McAllister) Lower Level	150	$2,163.82	$4,327.65
Alumni Reception Center (ARC) *	Kane Hall (200 McAllister) 2nd Flr.	100	$1,298.29	$2,163.82
Dining Commons *	Kane Hall (200 McAllister) 2nd Flr.	200	$1,298.29	$1,622.87
Colloquium Room (Room 501) *	(333 Golden Gate) 5th Flr.	55	$1,622.87	$2,163.82
Quad	333 Golden Gate	250	$1,081.91	$1,622.87
Roof Garden (Sky Deck)*	(333 Golden Gate) 5th Flr.	150	$1,622.87	$2,163.82
CLASSROOMS				
Facility	Location	Max Cap	Half Day Rate	Full Day Rate
Classroom 122	Mary Kay Kane Hall (200 McAllister) 1st Flr.	86	$865.53	$1,352.39
Classroom 123	Mary Kay Kane Hall (200 McAllister) 1st Flr.	86	$865.53	$1,352.39
Classroom 605	Mary Kay Kane Hall (200 McAllister) 6th Flr.	72	$865.53	$1,352.39
Classroom 630	Mary Kay Kane Hall (200 McAllister) 6th Flr.	57	$865.53	$1,352.39
Classroom 640/Rusty Dobbs	Mary Kay Kane Hall (200 McAllister) 6th Flr.	35	$865.53	$1,352.39
Classroom LL01*	(333 Golden Gate) Lower Level	80	$865.53	$1,352.39
Classroom LL02*	(333 Golden Gate) Lower Level	80	$865.53	$1,352.39
Classroom 101	(333 Golden Gate) 1st Flr.	98	$865.53	$1,352.39
Classroom 201	(333 Golden Gate) 2nd Flr.	82	$865.53	$1,352.39
Classroom 202	(333 Golden Gate) 2nd Flr.	82	$865.53	$1,352.39
Small Classroom 203	(333 Golden Gate) 2nd Flr.	32	$865.53	$1,352.39
Small Classroom 204	(333 Golden Gate) 2nd Flr.	32	$865.53	$1,352.39

SEMINAR ROOMS				
Facility	Location	Max Cap	Half Day Rate	Full Day Rate
Seminar Room 619	Mary Kay Kane Hall (200 McAllister) 6th Flr.	18	$649.15	$865.53
Seminar Room 620	Mary Kay Kane Hall (200 McAllister) 6th Flr.	18	$649.15	$865.53
Seminar Room LL03	(333 Golden Gate) Lower Level	24	$649.15	$865.53
Seminar Room LL04	(333 Golden Gate) Lower Level	24	$649.15	$865.53
Seminar Room 308	(333 Golden Gate) 3rd Flr.	16	$649.15	$865.53
Seminar Room 309	(333 Golden Gate) 3rd Flr.	24	$649.15	$865.53
Seminar Room 315	(333 Golden Gate) 3rd Flr.	16	$649.15	$865.53
Seminar Room 403	(333 Golden Gate) 4th Flr.	24	$649.15	$865.53
Seminar Room 404	(333 Golden Gate) 4th Flr.	24	$649.15	$865.53
Seminar Room 405	(333 Golden Gate) 4th Flr.	16	$649.15	$865.53
Seminar Room 307B	(333 Golden Gate) 2nd Flr.	18	$649.15	$865.53
Seminar Room 312	(333 Golden Gate) 2nd Flr.	23	$649.15	$865.53
Seminar Room 314	(333 Golden Gate) 2nd Flr.	23	$649.15	$865.53

CONFERENCE ROOMS				
Facility	Location	Max Cap	Half Day Rate	Full Day Rate
Conference Room 103	(333 Golden Gate) 1st Flr.	8	$649.15	$865.53
Conference Room 104	(333 Golden Gate) 1st Flr.	8	$649.15	$865.53
Conference Room 105	(333 Golden Gate) 1st Flr.	8	$649.15	$865.53
Conference Room 205	(333 Golden Gate) 2nd Flr.	8	$649.15	$865.53
Conference Room 206	(333 Golden Gate) 2nd Flr.	8	$649.15	$865.53
Conference Room 209	(333 Golden Gate) 2nd Flr.	8	$649.15	$865.53
Conference Room 304	(333 Golden Gate) 3rd Flr.	8	$649.15	$865.53
Conference Room 305	(333 Golden Gate) 3rd Flr.	2	$649.15	$865.53
Conference Room 306	(333 Golden Gate) 3rd Flr.	8	$649.15	$865.53
Conference Room 307	(333 Golden Gate) 3rd Flr.	8	$649.15	$865.53
Conference Room 311	(333 Golden Gate) 3rd Flr.	8	$649.15	$865.53
Conference Room 319	(333 Golden Gate) 3rd Flr.	8	$649.15	$865.53

Conference Room 406	(333 Golden Gate) 4th Flr.	8	$649.15	$865.53
Conference Room 407	(333 Golden Gate) 4th Flr.	8	$649.15	$865.53

*Note: Half day rate is anything less than four hours. Full day rate is four hours and above for any single day use.

Academic Village – Letter of Intent with SF State University

Presented to UC Law SF Board of Directors

September 12, 2025

UC Law San Francisco

Background

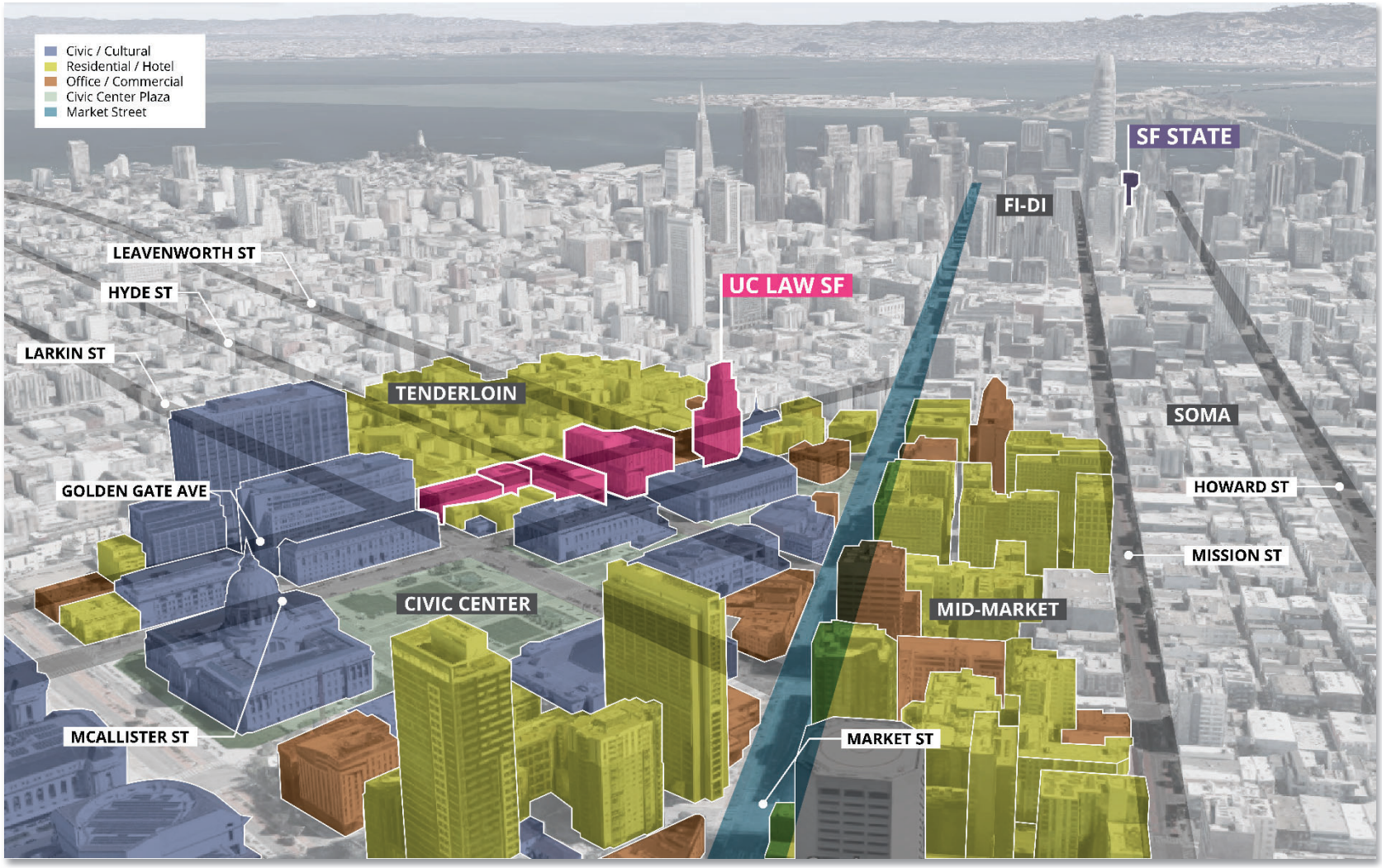
UC Law SF and San Francisco State University are in the process of finalizing a non-binding Letter of Intent to transition three academic programs from SF State's downtown campus to the UC Law SF campus beginning in **Fall 2026**.



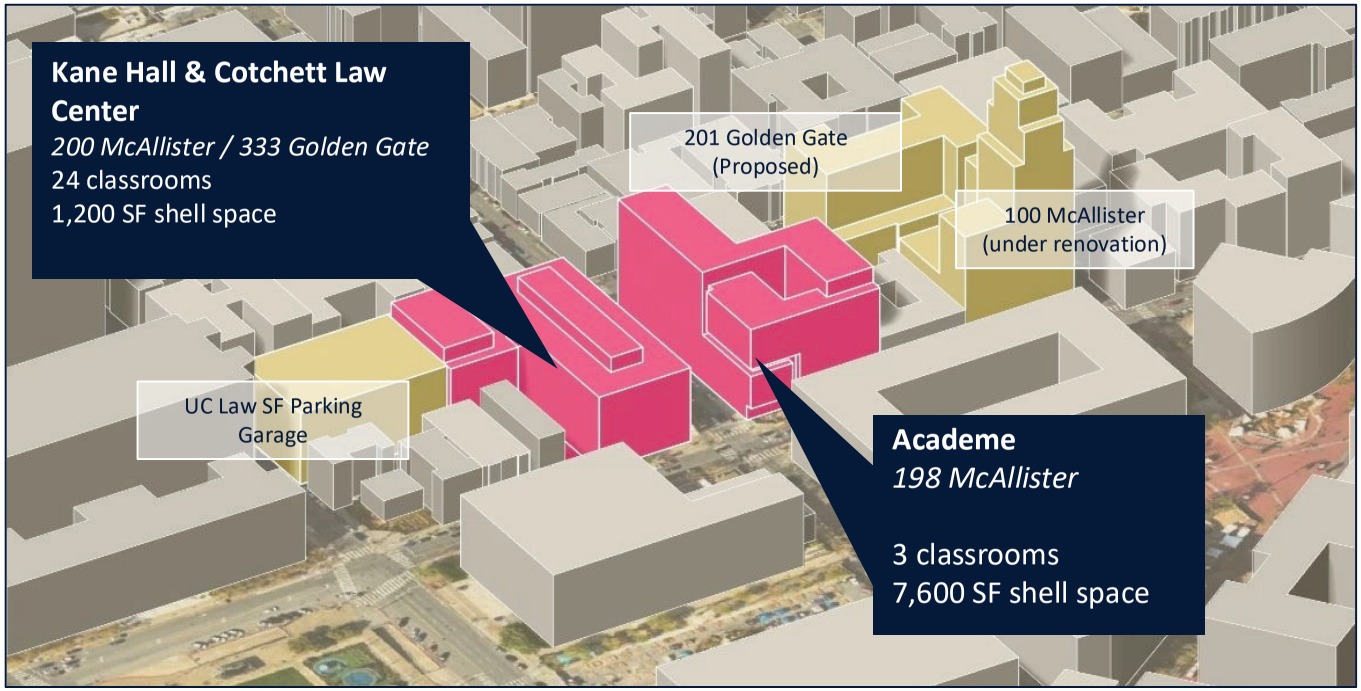
This includes the following programs:

- College of Professional & Global Education (CPAGE)
- College of Business (COB)
- Master of Public Administration (MPA)

Campus Location



Campus Layout



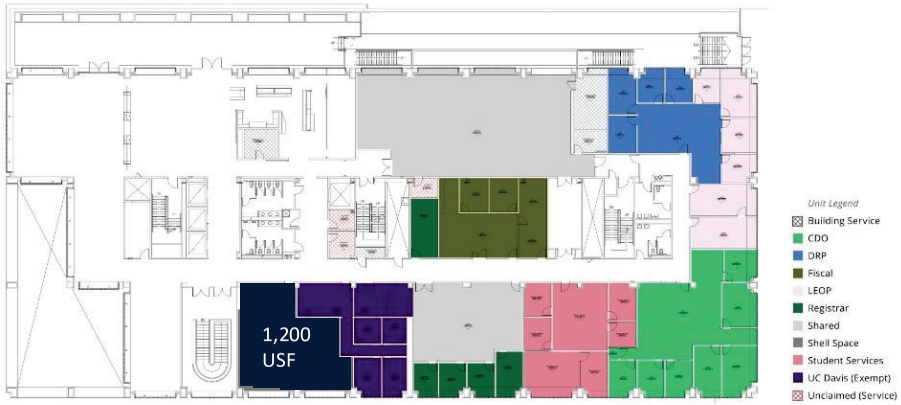
Kane Hall and the Cotchett Law Center have most of the campus' **classrooms** but very little shell space

The **Academe**, across Hyde Street, has very few classrooms, but most of the available **shell space**

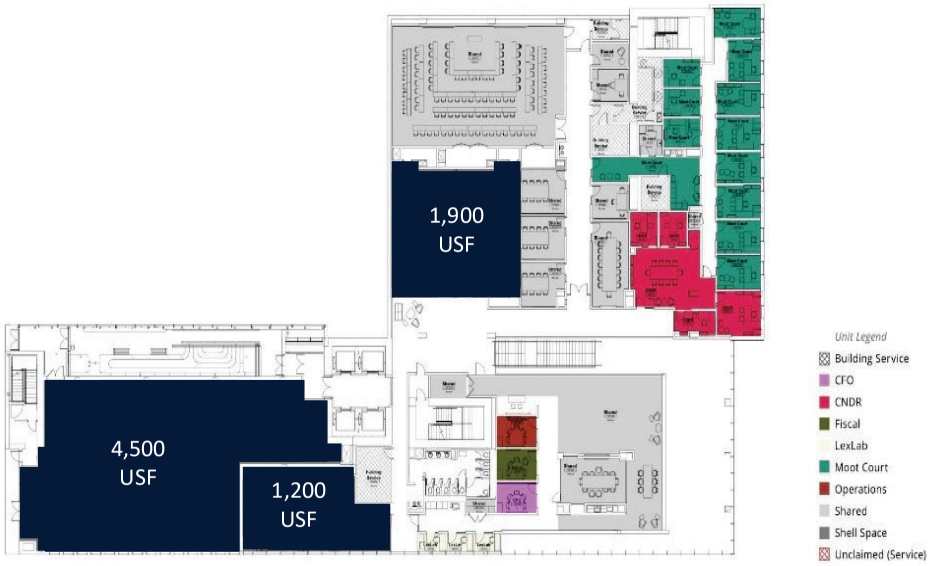
Existing Shell Space

Total: ~8,800 USF

Kane Hall, Floor 2. 200 McAllister



Academe, Floor 2. 198 McAllister



Shell Space Requirements

Programmatic refinement is required to determine final space needs and ensure fit in available shell space.

Scenario 1 – Share 2 / Build 2

Classrooms	Count	NSF Per	Total NSF	Total USF
	1	1,000	1,000	1,105
CPAGE	1	1,020	1,020	1,127
	1	2,010	2,010	2,161
OLLI	1	1,020	1,020	1,127
				5,520

Offices		Count	NSF Per	Total NSF	Total USF
	Office	1	200	200	254
CPAGE	Cubicle	2	100	200	277
	Office	1	200	200	254
OLLI	Cubicle	2	100	200	277
	Office	7	200	1,400	1,778
COB	Cubicle	5	100	500	693
MPA	Office	2	200	400	508
					4,041

Total 9,560
Available Space 8,790
Delta 770

Scenario 2 – Share 1 / Build 3

Classrooms	Count	NSF Per	Total NSF	Total USF
CPAGE	1	1,000	1,000	1,105
	1	1,020	1,020	1,127
OLLI	1	2,010	2,010	2,161
	1	1,020	1,020	1,127
MPA	2	1,020	2,040	2,254
				7,774

Offices		Count	NSF Per	Total NSF	Total USF
	Office	1	200	200	254
CPAGE	Cubicle	2	100	200	277
	Office	1	200	200	254
OLLI	Cubicle	2	100	200	277
	Office	7	200	1,400	1,778
COB	Cubicle	5	100	500	693
MPA	Office	2	200	400	508
					4,041

Total 11,815
Available Space 8,790
Delta 3,025

Instructional Space Request

All programs relocated together by Summer 2026

	Count of Classes	Count of Students Per Class	Schedule								Notes
			Start Time	End Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
College of Professional & Global Education (CPAGE)	1	25 to 30	8:00 AM	3:00 PM	■	■	■	■	■		Specialty Equipment
	1	25	8:00 AM	3:00 PM	■	■	■	■	■		
Osher Lifelong Learning Institute (OLLI)	1	50 or less	9:00 AM	5:00 PM						■	
	1	50 or less	10:00 AM	5:00 PM	■	■	■	■	■		
	1	25	10:00 AM	5:00 PM	■	■	■	■	■		
College of Business (COB)	3	25 to 30	4:00 PM	9:30 PM	■	■	■	■			
	1	15 to 20	4:00 PM	9:00 PM					■	■	
Master of Public Administration (MPA)	2	25 or less	5:00 PM	9:00 PM	■	■		■	■	■	

Estimated Annual Revenue

Scenario	COB	CPAGE	MPA	OLLI	Computer Lab	Estimated Revenue
One	Yes	Yes	Yes	No	No	$370,072.00
Two	Yes	Yes	Yes	No	Yes	$442,072.00
Three	Yes	Yes	Yes	Yes	No	$678,161.60
Four	Yes	Yes	Yes	Yes	Yes	$750,161.60

Anticipated Lease Duration

- Five years minimum, seven years preferred

Completed Milestones and Next Steps

- ✓ Negotiated conceptual approval from SF State staff (2023-2025)
- ✓ Confirmed SF State Program / Leadership Level of Interest (June 2025)

- Execute Non-Binding Letter of Intent between SF State and UC Law SF – *No later than September 30, 2025*
- Complete coordination between UC Law SF and SF State for shared classrooms by *November 1, 2025*
- Complete programming and design by *December 1, 2025*
- Construction and Program Implementation between December 2025 and June 2026
- SF State programs at UC Law SF commence by *July 1, 2026*

Academic Village – Letter of Intent with SF State University

Presented to UC Law SF Board of Directors

September 12, 2025

UC Law San Francisco

ACTION ITEM

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

2. SUBJECT: Philanthropic Allocation (Gift Fee) – Proposal to Increase

3. RECOMMENDATIONS:

That the Board of Directors authorizes an increase in Philanthropic Allocations (also known as Gift Fees) from 6% to 7%.

4. BACKGROUND:

UC Law SF's fundraising efforts are supported primarily by non-state funding sources, including block grants from the UC Law SF Foundation, program and gift fees, and allocations from the Endowment Management Cost Recovery Rate.

The philanthropic allocation, or gift fee, is currently set at 6% and has remained unchanged since 2020, when it increased from 5% (originally established in 2009). This allocation is applied to philanthropic gifts to help strengthen advancement and alumni relations efforts and offset related administrative costs. Gift fees are not applied to grants or non-cash gifts.

Considering rising operational costs, reduced campus-wide federal and state support, and the need to invest in building a stronger, more sustainable fundraising program, the advancement staff recommends increasing the gift fee from 6% to 7%. This adjustment will stabilize funding for core development operations, enhance alumni engagement, and keep UC Law SF aligned with peer UC campuses, particularly those in the Bay Area and those with law colleges.

Gift Fee Comparisons — UC Campuses

Campus	Percent
UC San Francisco	10%
UC Berkeley	7.50%
UC Davis	7%
UC Los Angeles	6.50%

5. PROPOSED RESOLUTION:

That the Board of Directors authorizes an increase in Gift Fees from 6% to 7%.

ACTION ITEM

1. REPORT BY: Chief Financial Officer David Seward

2. SUBJECT: Unite Here/Local 2 – Option Agreement Extension

3. BACKGROUND:

UC Law San Francisco ("UC Law SF") entered into an Option and Pre-Development Agreement with Unite Here Local 2 ("Local 2") on November 11, 2019, regarding the potential joint development of the property located at 201 – 247 Golden Gate Avenue. The contemplated project would be a mixed-use building including office, meeting, and hiring hall space for Local 2; campus housing for students and faculty; programmatic and academic offices/support space; and potentially other compatible uses that align with UC Law SF's Academic Village vision (the "Project"). The Final EIR for the Project was approved and certified by the UC Law SF Board of Directors at their September 13, 2024 meeting. UC Law SF is working to identify programmatic partners for the Project, which would allow for financial project viability resulting in implementation of the project.

The current Option Agreement provides UC Law SF with the exclusive right to enter into a ground lease for the property upon satisfaction of certain conditions. This right supports the College's long-range planning goals, particularly the development of additional housing and academic facilities. As the pre-development process continues, additional time is required to identify partners, finalizing planning, complete due diligence, and prepare for the next stages of the Project. UC Law SF staff recommends extending the Option Agreement by one (1) year to maintain UC Law SF's development rights and flexibility while discussions with Local 2, potential development partners, and financing entities proceed.

The proposed extension would require mutual agreement between UC Law SF and Local 2 and would otherwise retain the substantive terms of the current agreement. The extension ensures the College preserves the opportunity to integrate this key site into the Academic Village in a manner consistent with institutional priorities and community benefits.

Local 2's Executive Committee formally considered and approved the Option Agreement with UC Law SF on Tuesday, August 12, 2025.

4. RECOMMENDATIONS:

This item requests the UC Law SF Board of Directors approval for extending the Option Agreement with Local 2 for an additional year.

Attachment: Draft Unexecuted Option Agreement between Local 2 and UC Law SF

[Date]

Delivered Via Email and Overnight Courier

Tina Chen
Secretary-Treasurer
Unite Here Local 2
209 Golden Gate Avenue
San Francisco, CA 94102

Karen M. Tiedemann
Goldfarb & Lipman LLP
1300 Clay Street, 11th Floor
Oakland, CA 94612

Re: Notice of Exercise of Right to Extend Option Deadline

Dear Ms. Chen and Ms. Tiedemann:

Reference is made to that certain Option and Pre-Development Agreement dated November 11, 2019 (the "Option Agreement") between Unite Here Local 2, an unincorporated association ("Local 2") and University of California Hastings College of the Law (now known as UC Law, San Francisco) ("UC Law"). The Option Agreement has been amended by that certain First Amendment to Option and Pre-Development Agreement dated January 10, 2020, that certain Second Amendment to Option and Pre-Development Agreement dated September 10, 2020, and that certain Third Amendment to Option and Pre-Development Agreement dated November 4, 2021 (the "Third Amendment") (all together, the Option Agreement"). Capitalized terms that are not defined in this letter shall have the meanings given in the Option Agreement.

The Option Deadline specified in Section 1(a) of the Agreement (as amended by the Third Amendment) is currently November 11, 2025. Such date is the deadline for UC Law to exercise the Option to lease the Property as described in the Agreement. Pursuant to Section 1(a) of the Third Amendment, UC Law has the right to extend the Option Deadline for sixty (60) months. UC Law hereby elects to extend the Option Deadline in accordance with such right. Therefore, the new Option Deadline, as extended, shall be on or about November 11, 2030.

Please contact the undersigned if you have any questions about this notice.

[OPTIONAL]
Although this is not required in order to make this notice effective, we request that you execute this notice in the space indicated below to confirm receipt by Local 2.

Thank you for your assistance.

Very truly yours,

Unite Here Local 2 – Option Agreement Extension

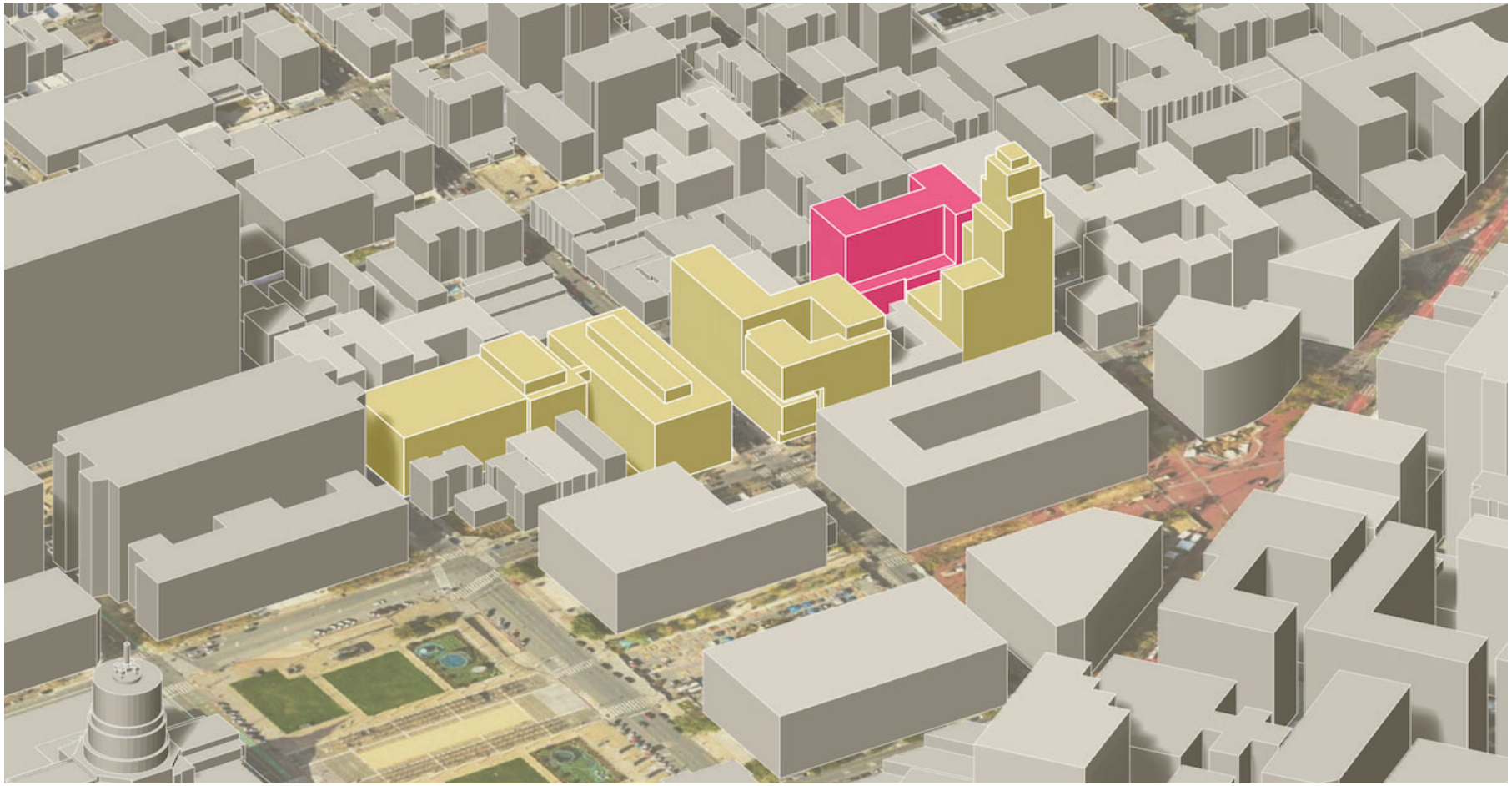
Presented to the UC Law SF Board of Directors

September 12, 2025

UC Law San Francisco

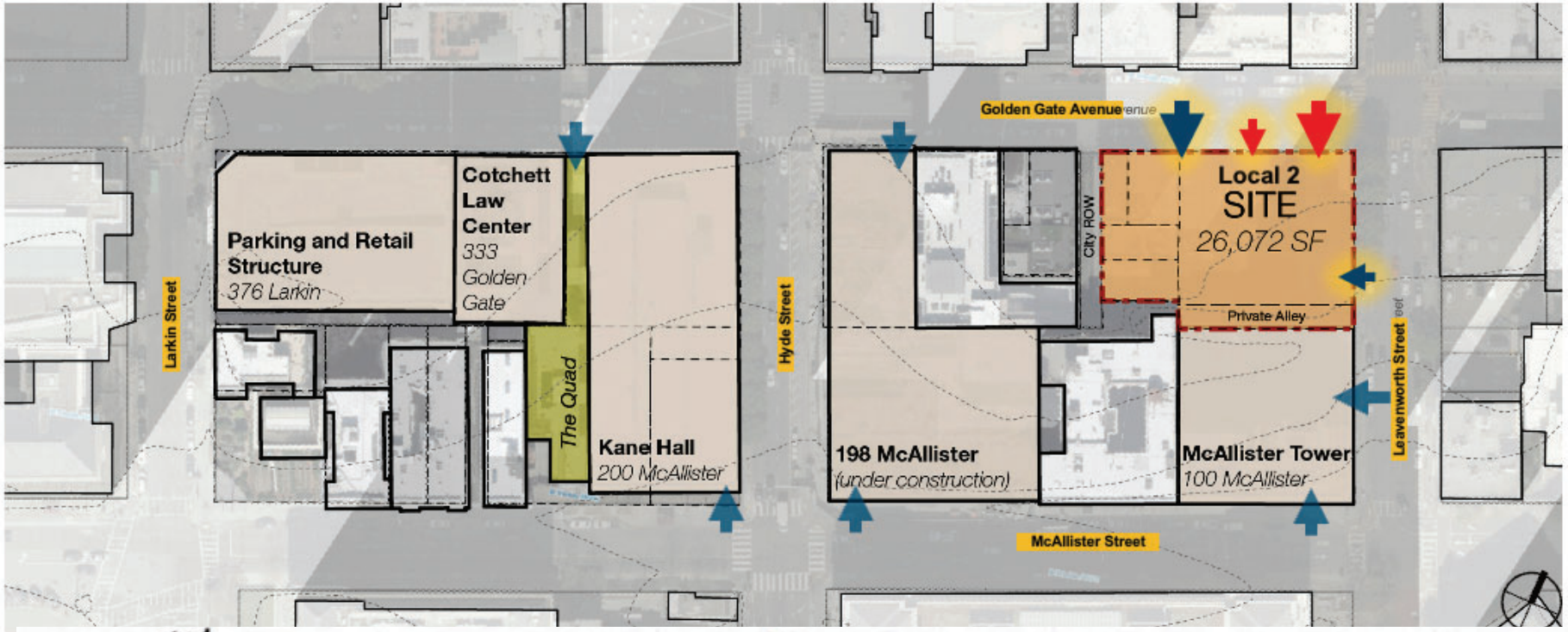
201 – 247 Golden Gate Avenue – Local 2 Project

CEQA Approved September 13, 2024



201 – 247 Golden Gate Avenue – Local 2 Project

CEQA Approved September 13, 2024





201 – 247 Golden Gate Avenue – Local 2 Project

CEQA Approved September 13, 2024

- Project site is 26,000 sq. ft.
- Proposed project is approximately 13-stories and 153 feet high
- Total of 238,000 sf
- Proposing 238 to 404 campus housing units



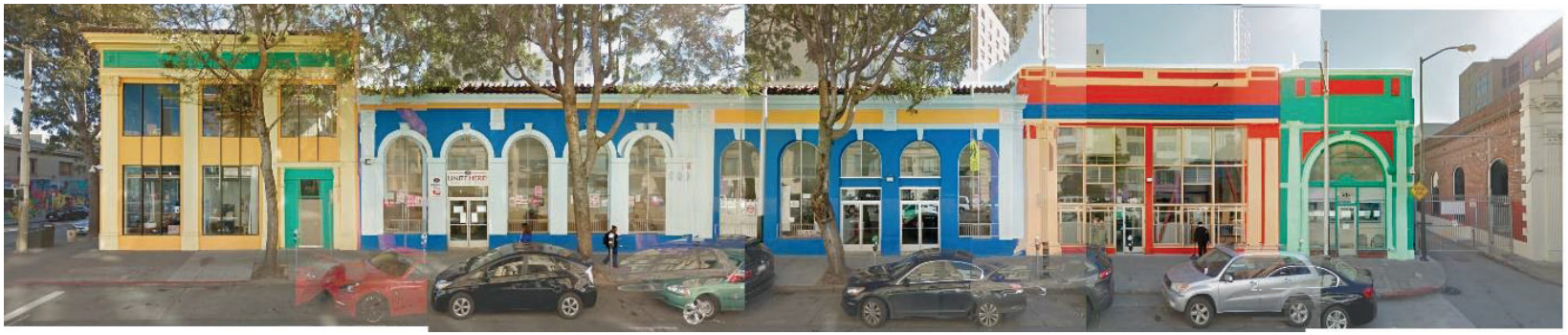
201 – 247 Golden Gate Avenue – Local 2 Project

CEQA Approved September 13, 2024

Project Timeline & Milestones

- Option Agreement executed on 11/11/19
- CEQA approved by UC Law SF Board of Directors on 09/13/24
- Existing Option Agreement expires by 11/11/25 if not renewed
- One-year options to renew for ( ) years
- Due diligence & conditions: TBD
- Financing: TBD
- Project Implementation: TBD





Unite Here Local 2 – Option Agreement Extension

Presented to the UC Law SF Board of Directors

September 12, 2025

UC Law San Francisco

ACTION ITEM

1. REPORT BY: Chief Financial Officer David Seward

2. SUBJECT: Nonstate Contracts and Grants in Excess of $100,000

3. RECOMMENDATIONS:

That the Board of Directors authorize award of the nonstate contracts in excess of $100,000 as described in this report.

Item: *7.2.1

Title: Housing Demand Study

Vendor Name: Brailsford and Dunlavey

.

Cost: $120,000 (Not to exceed)

Term of Contract: Two-years

Description:

Provides a housing demand analysis required under the Series 2020A and 2020B bond indenture when considering the issuance of new debt for additional housing projects. This requirement is triggered by the upcoming bond financing for the 100 McAllister Tower project. The scope of work also includes rent analyses and validations for the Academe at 198.

4. PROPOSED RESOLUTION:

That the Board of Directors authorize award of the 2025-25 nonstate contracts in excess of $100,000 listed below:

*7.2.1	Brailsford and Dunlavey – Housing Demand Study	$120,000 (Not to exceed)

REPORT ITEM

1. REPORT BY: Chief Financial Officer David Seward

2. SUBJECT: Academe at 198 – Revised Budget for 2025-26

3. REPORT:

Current data indicates that the Academe at 198 is unlikely to achieve the projected 95% occupancy rate upon which the initial budget was approved in June 2025; consequently, the budget has been revised to reflect the currently forecasted average occupancy of 85%. This is a conservative estimate based on actual occupancy as of August 31, 2025. The proposed budget adjustments outlined below accommodate the reduced occupancy and ensure compliance with the 1.2 Debt Service Coverage Ratio (DSCR) requirement.

Revenues

- Residential rent revenue for 2025-26 was revised to $13.75 million to reflect the new projected occupancy rate of 85%. The $2.2 million, or 14%, decrease in revenue is a result of lower occupancy in UC Law's unit allocation, while revenue from the UCSF allocation remains constant given the occupancy agreement.
- Due to lower occupancy in UC Law's units, the housing stipend contribution is also projected to decrease by approximately $280,000, or 20%. The approved rent subsidy of $2.9 million remains unchanged, enabling Academe at 198 to offer rental rates that are approximately 9% lower than the proforma rates.
- To fulfill the DSCR requirement, a DSCR Grant of $2.45 million is proposed to address the revenue shortfall resulting from lower residential rent income and housing stipend allocations.

Expenditures

The change in occupancy projection affects the variable costs as follows:

- Utilities – This cost category is the most impacted by the occupancy change and has been adjusted downward by approximately 12% or $209,248.
- Regular Contract Services – This category encompasses both occupancy-sensitive and fixed expenses. Janitorial and engineering costs exhibit low to moderate sensitivity to occupancy levels, whereas services such as window washing are fixed. Consequently, the overall cost within this category has been reduced by approximately 5%.
- All other expenditures are expected to remain unaffected by the change in occupancy levels, or they may experience minimal fluctuations.

PROPOSED RESOLUTION:

Resolved that the Board of Directors approves the attached revised 2025-26 budget for The Academe at 198.

Attachment:

- Academe at 198 – Revised Budget for 2025-26

	Initial Budget 2025-26	Revised Budget 2025-26		Percentage Change
REVENUES				
Residential Rent	15,943,000	13,747,544	*	-14%
Residential Rent Subsidy	2,900,000	2,900,000		0%
DSCR Grant	-	2,450,000	*	100%
Housing Stipend	1,400,000	1,120,000	*	-20%
Commercial Rent	2,497,124	2,497,124		0%
Retail Leases	72,900	72,900		0%
Other Revenue	91,200	91,200		0%
TOTAL OPERATING REVENUES	**$ 22,904,224**	**$ 22,878,768**		0%
EXPENDITURES				
Salaries and Wages	324,277	324,277		0%
Student Wages--Regular & Work-study	-	-		
Staff Benefits	136,058	136,058		0%
Regular Contract Services	570,062	539,862	*	-5%
Other Contract Services	71,000	71,000		0%
Utilities	1,627,616	1,426,367	*	-12%
Maintenance & Special Repairs	206,568	206,568		0%
Insurance	251,965	251,965	*	0%
Supplies	162,885	162,885		0%
Credit Card Fees	-	-		
Computer Software	100,000	100,000		0%
Printing & Reproduction	1,000	1,000		0%
Marketing	10,000	10,000		0%
Miscellaneous	32,000	32,000		0%
TOTAL OPERATING EXPENDITURES	**$ 3,493,431**	**$ 3,261,982**		-7%
NET OPERATIONS	**$ 19,410,793**	**$ 19,616,786**		1%
NONOPERATING REVENUES (EXPENSES)				
Building Improvements	-	-		
Transfers between 198 and Authority	-	-		
Transfers from Other Funds	-	-		
Transfers to Other Funds	-	-		
CIP Offset	-	-		
Capital Asset Additions/Deductions	-	-		
TOTAL NONOPERATING REVENUES (EXPENSES)	**$ -**	**$ -**		
TOTAL CHANGE IN NET ASSETS	**$ 19,410,793**	**$ 19,616,786**		1%

UC LAW SAN FRANCISCO
The Academe at 198
2025-26 Revised Budget- 85% Occupancy

9/12/2025

	Initial Budget 2025-26	Revised Budget 2025-26		Percentage Change
REVENUES				
Residential Rent	15,943,000	13,747,544	*	-14%
Residential Rent Subsidy	2,900,000	2,900,000		0%
DSCR Grant	-	2,450,000	*	100%
Housing Stipend	1,400,000	1,120,000	*	-20%
Commercial Rent	2,497,124	2,497,124		0%
Retail Leases	72,900	72,900		0%
Other Revenue	91,200	91,200		0%
TOTAL OPERATING REVENUES	**$ 22,904,224**	**$ 22,878,768**		0%
EXPENDITURES				
Salaries and Wages	324,277	324,277		0%
Student Wages--Regular & Work-study	-	-		
Staff Benefits	136,058	136,058		0%
Regular Contract Services	570,062	539,862	*	-5%
Other Contract Services	71,000	71,000		0%
Utilities	1,627,616	1,426,367	*	-12%
Maintenance & Special Repairs	206,568	206,568		0%
Insurance	251,965	251,965	*	0%
Supplies	162,885	162,885		0%
Credit Card Fees	-	-		
Computer Software	100,000	100,000		0%
Printing & Reproduction	1,000	1,000		0%
Marketing	10,000	10,000		0%
Miscellaneous	32,000	32,000		0%
TOTAL OPERATING EXPENDITURES	**$ 3,493,431**	**$ 3,261,982**		-7%
NET OPERATIONS	**$ 19,410,793**	**$ 19,616,786**		1%
NONOPERATING REVENUES (EXPENSES)				
Building Improvements	-	-		
Transfers between 198 and Authority	-	-		
Transfers from Other Funds	-	-		
Transfers to Other Funds	-	-		
CIP Offset	-	-		
Capital Asset Additions/Deductions	-	-		
TOTAL NONOPERATING REVENUES (EXPENSES)	**$ -**	**$ -**		
TOTAL CHANGE IN NET ASSETS	**$ 19,410,793**	**$ 19,616,786**		1%

* See attached narrative report.

REPORT ITEM

1. REPORT BY: Chief Financial Officer David Seward

2. SUBJECT: Debt Overview - Bond Indebtedness and Capital Leases

3. REPORT:

The use of debt and debt-like instruments has fueled the development of the Academic Village, with indentures issued by UC Law, the Academic Village Finance Authority, and the State of California. The table below summarizes debt service supported by institutional funds including those backstopped by annual state appropriations.

Debt service Series 2017, 2020, and 2025						
Year	FY2026	FY2027	FY2028	FY2029	FY2030	FY2031
Series 2017	$ 1,477,750	$ 1,474,500	$ 1,474,500	$ 1,476,750	$ 1,471,750	$ 1,474,500
Series 2020 A	$ 16,655,500	$ 17,035,750	$ 17,533,000	$ 18,047,625	$ 18,577,375	$ 19,120,000
Series 2020 B					$ 1,554,403	$ 1,603,693
Series 2025		$ 8,226,510	$ 10,074,422	$ 10,078,083	$ 10,075,878	$ 10,077,807
Total	$ 18,133,250	$ 26,736,760	$ 29,081,922	$ 29,602,458	$ 31,679,406	$ 32,276,000

Series 2017 – UC Law General Obligation Debt (Parking Garage)

The College issued the Series 2017 Refunding Bonds for $17,610,000 to refund the previously issued Series 2008 Bonds for the construction of the UC Law Parking Garage, and to reimburse the College for associated development costs. Located at 376 Larkin Street in San Francisco, California, the multi-level structure contains 395 parking stalls, and 12,612 square feet of ground-level retail space. These bonds bear interest rates ranging from 2.0% to 5.0%. Principal and interest payments are made semi-annually. The bonds mature in 2037 and are callable in 2027. Annual debt service is $1.5 million which is fully supported by garage revenues on debt with an average coupon rate of 4.63%.

Capital Lease – 333 Golden Gate – Cotchett Law Center

In 2020, the College entered into a facility lease agreement with the State of California totaling $76.7 million, recorded as a capital lease. The State Public Works Board sold lease revenue bonds to finance the building's construction. The building is then leased to the College with debt service provided through an annual appropriation sufficient to satisfy the State's lease revenue bond requirements.

6600-093-0001—For support of University of California College of the Law, San Francisco, for rental payments on lease-revenue bonds..... 3,090,000

The appropriation for 2025 totals $3.1 million. At the conclusion of the 30-year lease term, ownership of the building transfers to the College.

Series 2020B and 2020B – The Academe at 198

In 2020, the College issued Campus Housing Revenue Bonds, Series 2020A and Series 2020B with an original principal amount of $333,110,000 and $27,605,525, respectively, for the construction of the Academe at 198, a 656-unit student housing facility with academic, administrative space, and retail space at 198 McAllister. Additionally capital appreciation bonds (CAB bonds) were issued as part of Series 2020B issuance. Debt service on the 2020B bonds becomes payable on July 1, 2029 (FY 2030) with interest compounded from the date of issuance on a semi-annual basis through the conversion date in 2035. Series 2020A bonds are callable at par in 2030; the amount outstanding at 7/1/2030 will be $325,410,000 with 5% coupons. Series 2020B are zero coupons that convert to 6.75% on 7/1/2035. The blended All Inclusive Cost for the Series 2020A and 2020B is 5.2%.

Series 2025 – Phase 2 McAllister Tower Seismic Upgrade Project

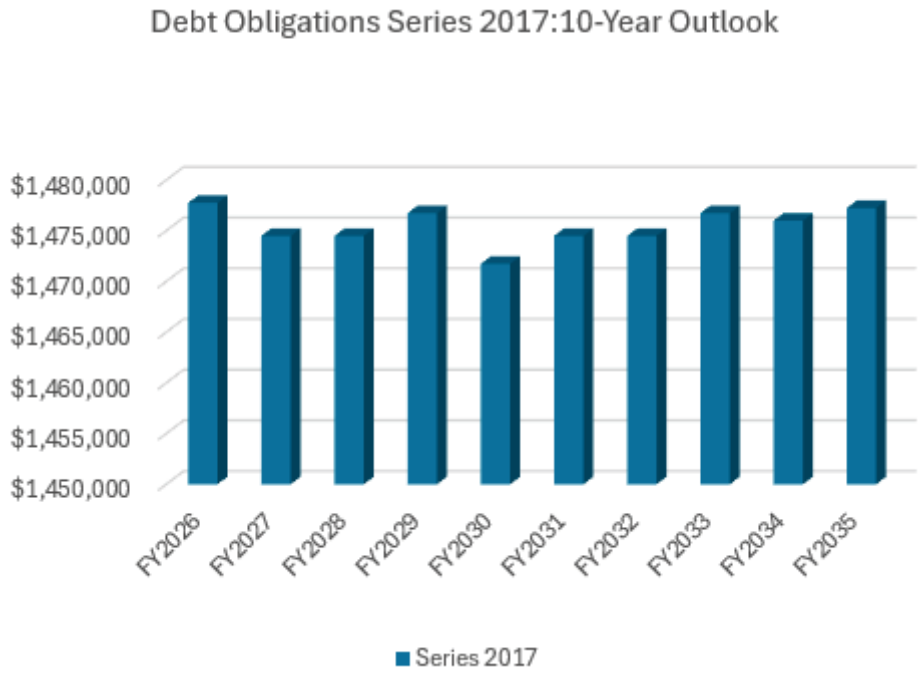
The issuance of Series 2025 bonds is underway with a targeted closing date in December 2025. These bonds, while a debt of UC Law SF, are to be supported by an annual appropriation of $10.1 million pursuant to the Budget Act of 2025. The $10.1 million will function as debt service for taxable debt (at an estimated rate of 6%) to support an estimated $139 million in proceeds for the project. Investors in the Series 2025 issuance are subject to appropriation risk as the state legislature is not obligated to appropriate the funds in future budget periods.

6600-001-0001—For support of University of California College of the Law, San Francisco..... 34,915,000
Schedule:
(1) 5530-Support..... 34,915,000
Provisions:
1. This appropriation is exempt from Section 31.00.
2. Of the funds appropriated in this item, $10,079,000 ongoing General Fund shall be allocated to support debt service associated with the McAllister Tower building capital renovation project on the College of the Law, San Francisco campus.

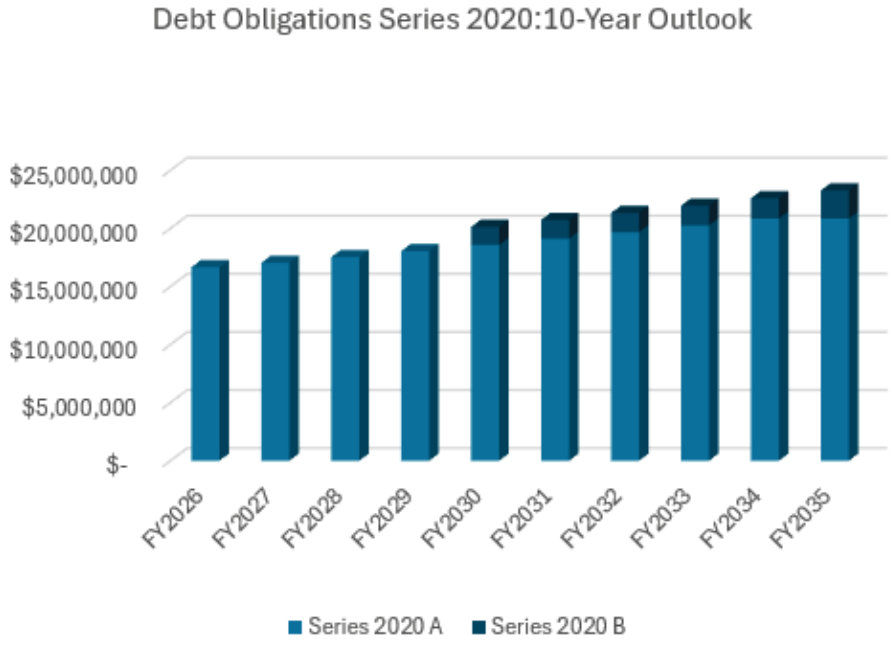
The project is being supplemented with federal Historic Tax credits that offset 20% of eligible project costs. After adjusting transaction costs and property taxes, $33 million in Historic Tax Credit net proceeds are anticipated.

Displays: Overview – Debt and Capital Leases

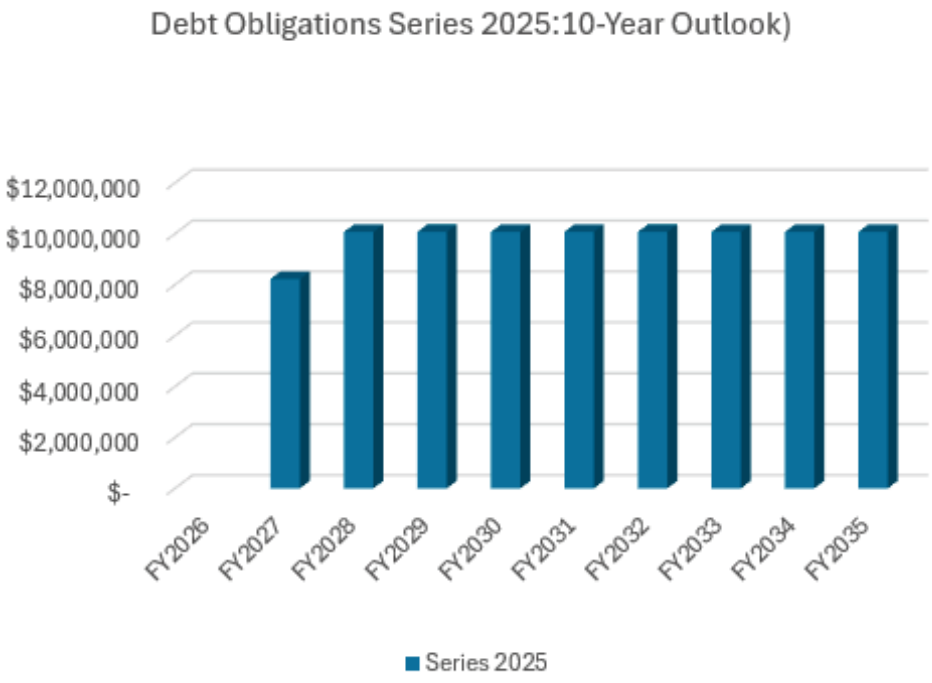
Series 2017



Series 2020



Series 2025 (Preliminary)



ACTION ITEM

1. REPORT BY: Chief Financial Officer David Seward

2. SUBJECT: Reimbursement Resolution and Financing Overview – Series 2025 Bonds

3. BACKGROUND:

Attached is a summary of the plan of finance for phase 2 of the McAllister Tower Seismic Upgrade project.

4. RECOMMMENDATION:

That the Board of Directors approves the attached resolution authorizing the reimbursement of expenditures associated with the project.

Attachments:

- Declaration of Official Intent of the University of California College of the Law, San Francisco to Reimburse Certain Expenditures from Proceeds of Indebtedness.

- Memorandum: Summary of Plan of Finance and Timeline for Board Authorization for the proposed University of California College of the Law, San Francisco, Limited Obligation Bonds (100 McAllister Street Tower) Federally Taxable, Series 2025 (the "Proposed Bonds"), September 12, 2025.

DECLARATION OF OFFICIAL INTENT
OF THE UNIVERSITY OF CALIFORNIA COLLEGE OF THE LAW, SAN FRANCISCO TO REIMBURSE CERTAIN EXPENDITURES FROM PROCEEDS OF INDEBTEDNESS

WHEREAS, the University of California College of the Law, San Francisco (the "College") intends to construct, equip and furnish facilities for academic functions, campus housing, workforce housing, and other community serving amenities, located at 100 McAllister, San Francisco, California (collectively, the "Project");

WHEREAS, the College expects to pay certain expenditures (the "Reimbursement Expenditures") in connection with the Project prior to the issuance of indebtedness for the purpose of financing costs associated with the Project on a long-term basis;

WHEREAS, the College reasonably expects that debt obligations in an amount not expected to exceed $200,000,000 will be issued and that certain of the proceeds of such debt obligations will be used to reimburse the Reimbursement Expenditures; and

WHEREAS, Section 1.150-2 of the Treasury Regulations requires the College to declare its reasonable official intent to reimburse prior expenditures for the Project with proceeds of a subsequent borrowing;

NOW, THEREFORE, the College declares:

Section 1. The College finds and determines that the foregoing recitals are true and correct.

Section 2. This declaration is made solely for purposes of establishing compliance with the requirements of Section 1.150-2 of the Treasury Regulations. This declaration does not bind the College to make any expenditure, incur any indebtedness, or proceed with the Project in any manner.

Section 3. The College hereby declares its official intent to use proceeds of indebtedness to reimburse itself for Reimbursement Expenditures.

Section 4. This declaration shall take effect from and after its adoption.

The undersigned, Secretary of the governing board of the College, hereby certifies that the foregoing is a full, true and correct copy of the declaration of the governing board of said College duly made at a meeting thereof held on the date specified below, and that said declaration has not been amended, modified or revoked.

_____ _____

John K. DiPaolo, Secretary of the College Date

4135-7689-2253

MEMORANDUM

TO: **Board of Directors**
FROM: **David Seward, Chief Financial Officer**
Scott Smith, CSG Advisors Incorporated
DATE: September 12, 2025
RE: Summary of Plan of Finance and Timeline for Board Authorization for the proposed University of California College of the Law, San Francisco, Limited Obligation Bonds (100 McAllister Street Tower) Federally Taxable, Series 2025 (the "Proposed Bonds")

Purpose of Memo. The purpose of this Memorandum is to summarize the key elements and process for issuance of the Proposed Bonds to fund the 100 McAllister Street Tower Improvements (the "Project"). This debt is supported by $10,079,000 in funding appropriated in the Budget Act of 2025 to UC Law SF (the "College") for the project.

Project Summary. The Project is taking place in two phases as follows:

- Phase 1. Currently underway, funded from the 2022 State grant of $90 million and $9.1 million in previously approved funding from the College, this phase includes seismic reinforcement, terra cotta restoration, interior abatement, and gut demolition. The current cost for the completion of Phase 1 is estimated to be $106 million.
- Phase 2. This phase is scheduled to commence in 2025-26 with completion in late 2027. Total cost is estimated at $171 million. The scope includes:
  - Completion of seismic upgrade such that 100% of the structure complies with UC Law Seismic Safety Policy standards
  - Window repair and replacement
  - Historic preservation and restoration as required by the National Park service for eligibility for federal Historic Tax Credits:
    - Main lobby
    - Walnut Room lounge
    - Grand ballroom
    - Penthouse 25th and 25th floors historic fabric
  - Residential apartment build-outs for approximately 200 bedrooms (or 40 units) from floors 5-13 and academic office/classroom shell improvements
  - Interior cold shell improvements and partial material stocking from floors 5 and 14-23
  - Building systems (e.g., MEP, Fire Life Safety, IT/Data, Code/Wayfinding/Identity Signage, Sustainability, Elevator, etc.) upgrades.

Upon completion of both phases, the renovated and structurally strengthened 293,000-square foot building will add 40 residential units (3 to 6 bedrooms each) with approximately 200 beds. The intention to is to provide a range of rent price point options in combination with the units at 198 McAllister to accommodate students, faculty, and early career professionals, some of whom may share their unit with their partner or family. The lower podium (floors 2-4) of the building is slated to accommodate one or more academic institutional partners to the College with potential classroom, seminar, office, and meeting spaces.

Future phase(s) are subject to the availability of funding. Sources may include a combination of private philanthropy from alumni and other supporters, institutional funds, additional state appropriations, grants or future debt issuance. Future phases would include:

- Development of an athletic and recreational center including a basketball court in the lower level.
- Completion of residential buildout creating approximately 80 additional beds on floors 5 and 14-23.
- Renovation and refurbishment of the Skyroom lounge on the 24th floor
- Completion of two residential units (with two beds) on floors 25-26.
- Renovation of the Great Hall.

There is no current cost estimate for the future phase(s).

The current construction schedule is outlined below:

Project Rehabilitation Schedule	
Activity	**Date(s)**
Construction Start	May 2024
1st Phase Completion	August 2026
2nd Phase Start	March 2026
2nd Phase Completion	July 2027
Stabilized Occupancy	July 2028

Summary of Plan of Finance. The current Plan of Finance is to fund the remainder cost of Phase 1 together with the cost of Phase 2 of the Project using a combination of Historic Tax Credit Equity Contribution from a prospective tax credit investor, in combination with proceeds of the Proposed Bonds. Actual contribution amounts will depend on certain market factors. The actual amount of tax credit equity provided will depend on a competitive solicitation process to select a tax credit investor as described below. For the Proposed Bonds, the amount of net proceeds will depend on the rating of the Bonds by Moody's Ratings, availability of bond insurance, and market interest rates at the time of pricing the Proposed Bonds. Preliminary estimates of the amount to be raised from each source are:

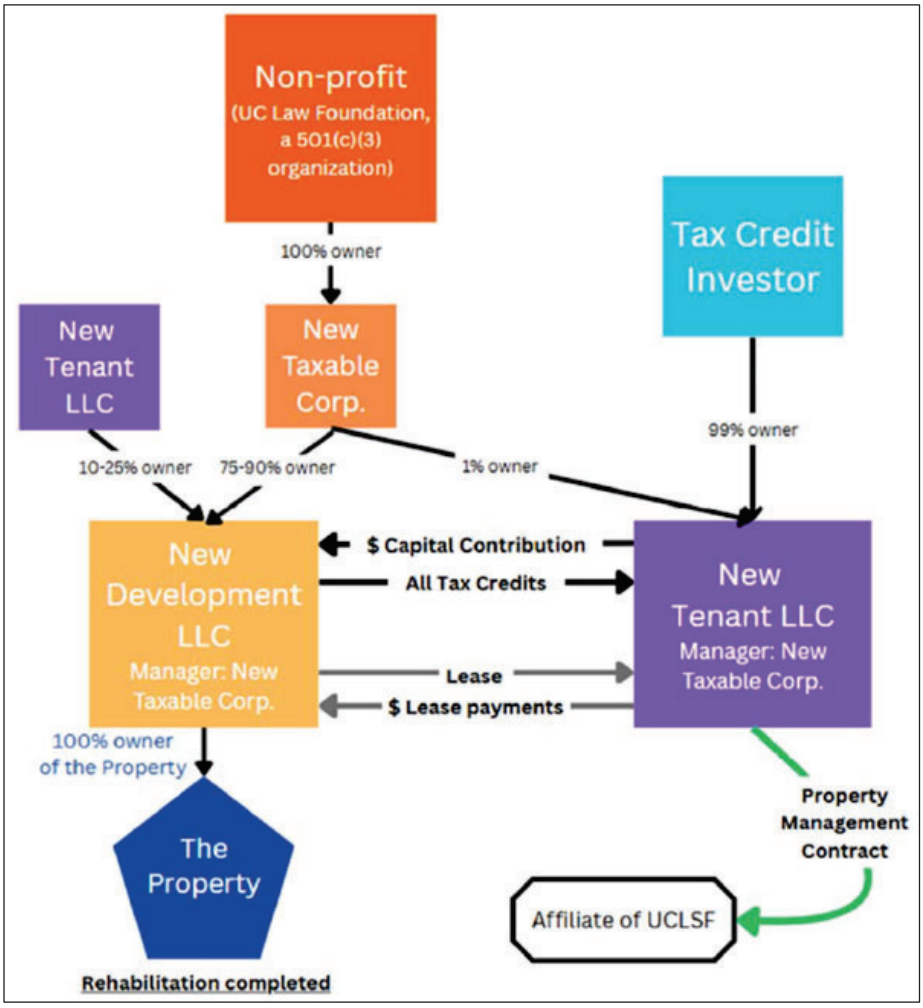
Preliminary Comparison of Funding Depending on Rating, Taxability of Bonds, Bond Market Interest Rates & Estimated Tax Credit Raise*

Scenario	A	B	C	D
Bond Type	Tax-Exempt		Taxable	
Moody's Rating Assumption	"A2"	"Baa3"	"A2"	"Baa3"
Interest Rate Assumption	4.50%	5.00%	6.00%	6.50%
Sources of Funds	**A**	**B**	**C**	**D**
Bonds	164,176,000	154,939,000	138,736,000	131,618,000
Historic Tax Credits	-	-	33,062,000	33,069,000
Other Gap Funding Needed	12,477,000	21,626,000	6,143,000	13,314,000
Total Project Costs	176,653,000	176,565,000	177,941,000	178,001,000

** Preliminary, subject to change based on market conditions, realized/unrealized cost contingencies, and other factors*

Historic Tax Credit Solicitation. On August 28, the College issued a Request for Letter of Intent to serve as Tax Credit Investor for the Project. Bids are due on September 25, 2025. Upon recent of bids, the finance team for the College will evaluate and confirm the financial feasibility of the use of the Historic Tax Credits, and, if confirmed, select the investor.

Legal Structure Required for Historic Tax Credits. 100 McAllister is currently owned by UC Law SF. During the Tax Credit Period (approximately 5 years after completion), the property will be transferred to and owned by an entity that includes a 501c3 entity to be controlled by the College and an entity that will include the Tax Credit Investor in a multistep process to achieve the final ownership structure shown below.



The College intends to form the 501c3 entity using the Academic Village Finance Authority, also known as the Hastings Campus Housing Financing Authority, the joint powers authority created by the College to facilitate the issuance of the 2020 Bonds for 198 McAllister. Alternatively, the College could use its existing 501c3, the UC Law Foundation (as reflected in the illustration above), for this purpose. However, the creation of a purpose-built 501c3 controlled by the Academic Village Finance Authority structured in such as way as to be deployable on a statewide basis provides the opportunity for the College to replicate this financing model on a broader scale.

Financial Guaranty. During the construction period, the Tax Credit Investor is likely to require a financial guaranty for tax credit equity paid in by the investor until the completion date. Post-completion, the Tax Credit Investor may require additional guaranties related to its projected return. The precise amount and terms of such guaranties will be determined through the solicitation, but if required, would likely by necessity come from the College's balance sheet.

Evaluation of Historic Tax Credit Financing Approach. Upon receipt of LOI's from prospective tax credit investors, the finance team will evaluate the financial feasibility of the historic tax credit financing approach with the benefit of the market's reaction to UC Law's proposal. The use of historic tax credits requires that the Proposed Bonds be issued on a federally taxable basis when otherwise the bonds could be issued on a tax-exempt basis. Additionally, the legal structure could impose significant property tax requirements for the private entity that would own the Property during the Tax Credit Period. The College is currently working with the City and County of San Francisco to confirm this property tax requirement. There are certain provisions under State law that allow the City to reduce property taxes for qualifying historic preservation properties.

All else being equal, based on assumptions provided by the College's underwriter team (Raymond James and Loop Capital), the estimated cost to the College of issuing federally taxable vs. tax-exempt bonds is approximately $23-25 million. However, the approach does maximize the total proceeds needed to support the project as the Historic Tax Credits are projected to generate net proceeds of $33 million to fund the Project; and, factoring in other costs, the net benefit is estimated to be $6-8 million.

Prior to issuing the Proposed Bonds and awarding the bid for the Tax Credit Investor, the finance team will undertake an evaluation to confirm that the costs imposed by the Historic Tax Credits are significantly less than the additional funds raised from this source. Otherwise, the Proposed Bonds will be issued on a tax-exempt basis and further scope reductions will be necessary.

198 McAllister / 2020 Bonds Ground Lease Covenant. The Ground Lease for the 2020 Bonds for 198 McAllister contains a covenant that limits the College's ability to produce additional housing at 100 McAllister until certain coverage requirements are met at 198 McAllister. The covenant requires the College to retain an independent consultant to conduct a study measuring market demand for residential beds within the campus. The market study would be used to estimate debt coverage ratios for the first full year following the opening of 100 McAllister, which would be FY 2028-29, as established under the covenant. The College has retained Brailsford & Dunlavey, Inc. to conduct the demand study with delivery of a first draft the week of October 13th.

Proposed Bond Issuance. The finance team is currently working on a package of documents for the Board to consider related to the Proposed Bonds, including a resolution authorizing the issuance of Proposed Bonds, and providing authority to authorized officers of the College to take certain actions to complete the sale of the bonds.

Security for the Bonds. The Proposed Bonds are structured as limited obligations of the College payable solely from Available Funds, which the Trust Agreement defines as, among other things, the funds in the annual amount of $10,079,000 appropriated each year by the Legislature of the State of California to UC Law San Francisco, including as appropriated for the 2025-26 budget year pursuant to Provision 2 of Item 6600-001-0001 of Section 2

of Senate Bill No. 101 (2025). The College has no obligation to pay debt service on the Proposed Bonds from any funds other than Available Funds.

Under the Trust Indenture, the College covenants that while the Proposed Bonds are Outstanding (i) the Chief Financial Officer will actively pursue the appropriation of Available Funds in its annual requests to the Legislature of the State of California and (ii) the College will promptly review the Governor's proposed budget upon its release in January of each calendar year and the May Revision that follows, and actively seek to remedy any exclusion, deferral or material deviation regarding the appropriation of Available Funds in an amount sufficient to provide for timely payment in full of the principal of and interest on the Bonds during the immediately following Fiscal Year, prior to the final budget enactment.

The Indenture also establishes an Appropriation Delay Reserve, funded at issuance of approximately three month's debt service (or roughly $2.8 million), to be available in the event of a delay in the timely adoption of the State budget and/or delay in allocation of the appropriation in a given fiscal year. Funding for this reserve would be sourced from Available Funds derived from savings resulting from the timing of the issuance.

Upon receipt of a rating by Moody's, the College will seek bond insurance as credit enhancement for the Proposed Bonds. Bond insurance is a policy from an insurer that guarantees timely payment of principal and interest on a bond if the issuer defaults, providing investors with guaranteed cash flow and typically a higher credit rating for the bond. Bond insurance is typically purchased when the interest cost savings attributable to the insurance is greater than the proposed policy premium.

Authorizing Resolution. The authorizing resolution provides certain approvals for the issuance of the Proposed Bonds:

- Issuance cannot exceed certain parameters: not to exceed $200 million; interest rate not greater than 8.00%; and an underwriter's discount not greater than 1.00% of the principal amount of the Proposed Bonds.
- Bonds may be issued on a taxable or tax-exempt basis, depending on the finance team evaluation of the historic tax credit financing approach as described above.
- Appointment of the Finance Team.
- Approval of legal documents, described below.
- Authorization to obtain bond insurance and/or a reserve account surety policy.
- Authorization for authorized officers of the College to take any other actions needed to complete the bond sale.

Summary of Legal Documents. By adopting the Resolution, the Board will authorize the issuance of the Proposed Bonds, and approve the execution and delivery of the following documents. Each of the documents are presented in substantially final form, and will be completed after the Proposed Bonds are priced.

(i) Indenture. The Indenture contains provisions pertaining to the terms of the Bonds, including maturity schedule, interest rates and redemption provisions. It also provides for the establishment and maintenance of certain funds and accounts and the rights and duties of the Trustee.

(ii) Bond Purchase Agreement. In connection with a public offering, this agreement will be executed on the day that the Bonds are priced (i.e., when the principal amount of the Bonds, the interest rates and the original issue premium or discount will be determined, a few weeks before the closing date). Under this agreement, Raymond James and Loop Capital (the Underwriters) will agree to buy the Bonds from the College on the issuance date upon satisfaction of the closing conditions specified in the Bond Purchase Agreement, including the execution and delivery of applicable documents by the College.

(iii) Preliminary Official Statement. In connection with a public offering, the Preliminary Official Statement (the "POS") will be distributed by the Underwriters for use in marketing the Bonds to potential investors. The POS provides a summary of the proposed terms of the Bonds, the sources of repayment and certain risks relating to the investment in the Bonds. As permitted by federal securities laws, some of the terms relating to the Bonds (such as interest rates and redemption schedule), will appear as blanks or be footnoted as "preliminary; subject to change" in the POS and will not be determined until the pricing of the Bonds. After the pricing of the Bonds, these terms will be inserted, and the POS will be converted into a final Official Statement. The Underwriters will then distribute the Official Statement to buyers of the Bonds and cause it to be uploaded onto the Electronic Municipal Market Access website (known as EMMA), the official repository for information pertaining to municipal securities issued in the United States. The Official Statement is the "offering document" for the Bonds, required to be made available to investors pursuant to federal securities laws. The Official Statement must include all information that would be material to a prospective investor's decision whether to purchase the Bonds. While the various members of the financing team have contributed to the preparation of the POS and the Official Statement, the College is ultimately responsible for ensuring that the POS is accurate, contains no misleading information and does not omit any information necessary to make the POS not misleading to investors.

(iv) Continuing Disclosure Certificate. Under the Continuing Disclosure Certificate, the College will agree to provide a copy of its audited financial statements and a report of other information relevant to the security of the Bonds for filing each year, to make this information available to the investors. The College will also agree to disclose and make filings upon the occurrence of certain enumerated events (such as material default by the College on its financial obligations).

Timing for Board Approval. The finance team is drafting the documents for submittal for the October 21 Meeting of the Board of Directors. At that time, the finance team may have completed the evaluation of the historic tax credit financing approach but will still be completing review of the market study and determination of the debt service coverage ratios under the 2020 Ground Lease. The finance team will be in the process of preparing for the rating presentation to Moody's and subsequent pursuit of bond insurer proposals.

Timeline for Issuance. At present, the finance team expects that the Proposed Bonds may be ready for marketing and public sale in the latter half of November or early December, with closing in mid-December (there is typically a two-week period between bond pricing and closing). Given recent volatility in the municipal market due to macroeconomic conditions and other factors, the sale may be delayed for pricing and closing in January. The timing of pricing and closing of municipal bonds does not typically overlap the calendar year.

REPORT ITEM

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

2. SUBJECT: Investment Report – As of June 30, 2025

3. REPORT:

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

	As of 6/30/2024	As of 6/30/2025	FYTD %
Hastings Endowment Fund (GEP)	$57,038,235	$63,206,851	10.8%
Hastings Operating Fund (GEP)	78,281,533	87,763,484	12.1%
Endowed Funds Held by Regents (GEP-7)	11,241,618	12,058,497	7.3%
Hastings Operations – STIP	323,025	7,655	-97.6%
Sub-total	146,884,411	163,036,487	11.0%
100 McAllister Project Fund – STIP	48,910,757	55,467,207	13.4%
100 McAllister Project Fund – TRIP	50,443,458	0	-100.0%
Sub-total	99,354,215	55,467,207	-44.2%
Total	$ 246,238,626	$ 218,503,693	-11.3%

Attachment:

- UC Endowment Report, Office of the Chief Investment Officer, March 31, 2025

UNIVERSITY OF CALIFORNIA

UC Endowment

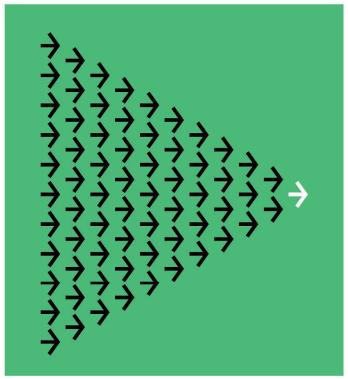
General Endowment Pool
Blue and Gold Endowment Pool

March 31, 2025

UC INVESTMENTS

UC Investments Way

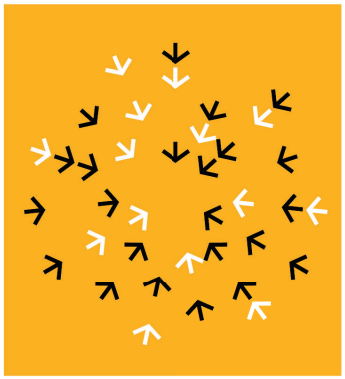
LESS IS MORE



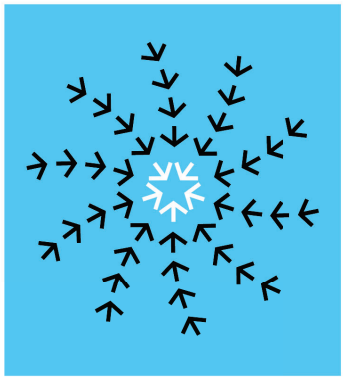
RISK RULES



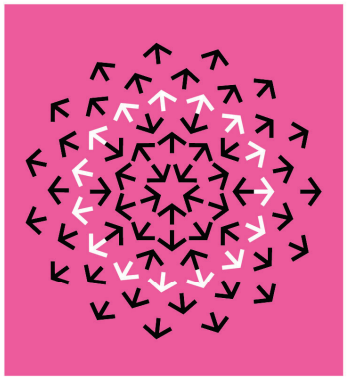
CONCENTRATE



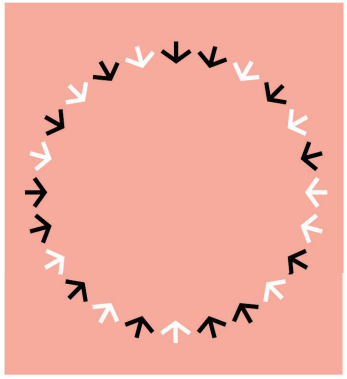
CREATIVITY PAYS



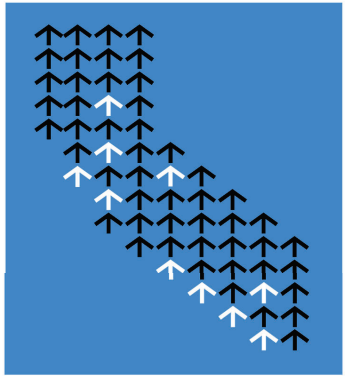
BUILD KNOWLEDGE



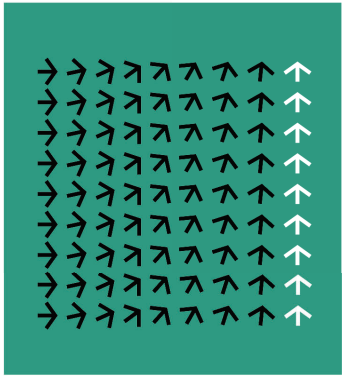
TEAM UP



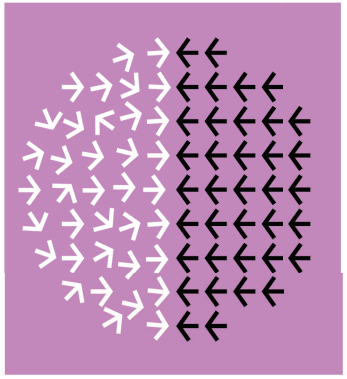
WHAT MAKES UC, UC



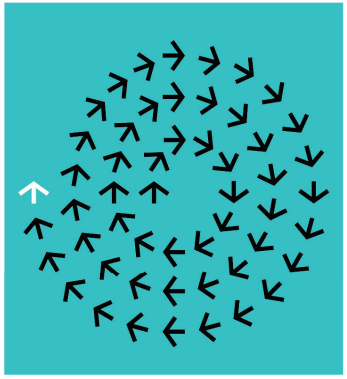
PERFECT ALIGNMENT



HUMAN MEETS MACHINE



CENTENNIAL INVESTING



UC Endowment

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

INVESTMENT OBJECTIVES

General Endowment Pool

- Maximize real, long-term total returns(income plus capital appreciation adjusted for inflation), while assuming the appropriate levels of risk.

- Maintain the liquidity necessary to meet the investment goals of the Endowment, which are to provide a stable and continuously growing stream of income, all while preserving the real (inflation-adjusted) purchasing power of assets.

Blue and Gold Endowment Pool

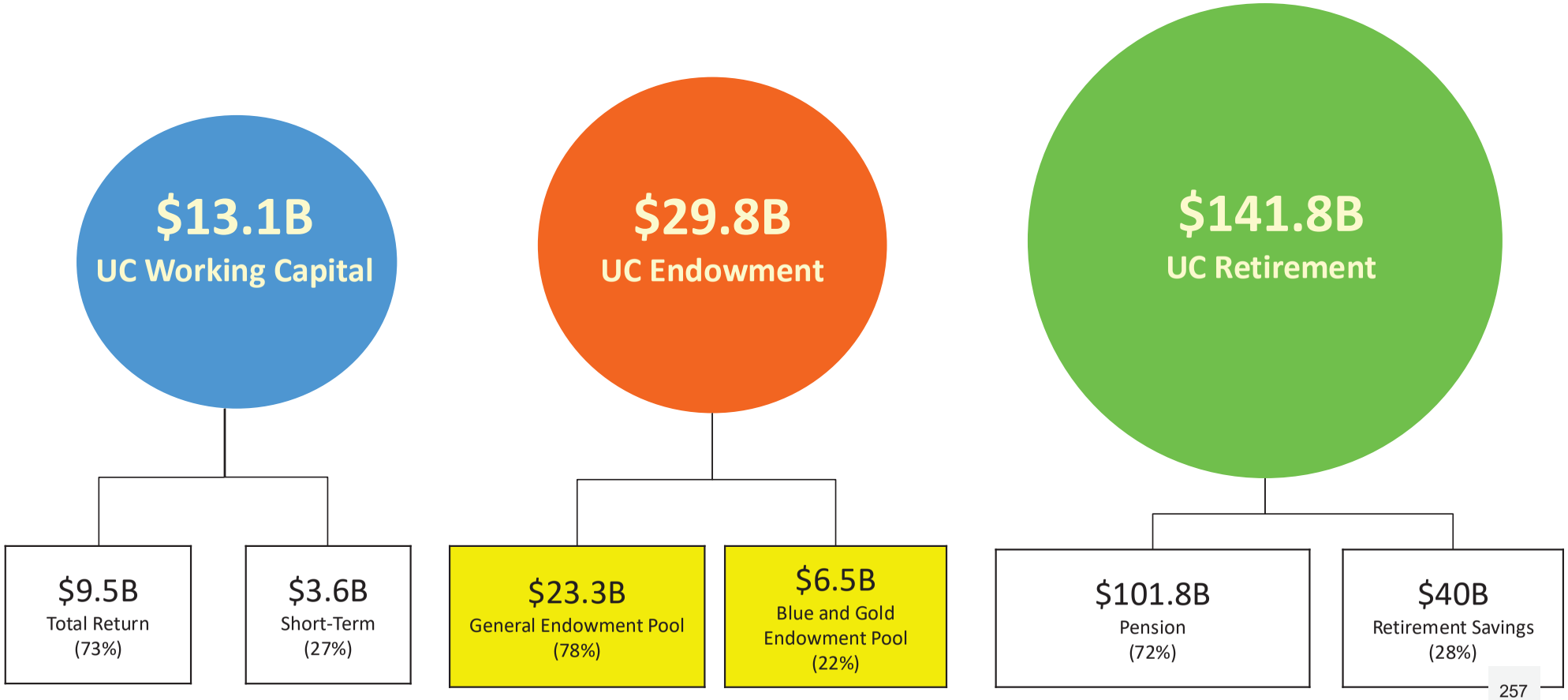
- Provide low cost, liquid, diversified investment vehicle for long-term excess capital reserves.

CENTENNIAL PERFORMANCE

UC ENDOWMENT	UC RETIREMENT	UC WORKING CAPITAL
GENERAL ENDOWMENT POOL **93 Years**	PENSION **65 Years**	TOTAL RETURN **16 Years**
BLUE AND GOLD ENDOWMENT POOL **6 Years**	RETIREMENT SAVINGS **58 Years**	SHORT-TERM INVESTMENT POOL **50 Years**

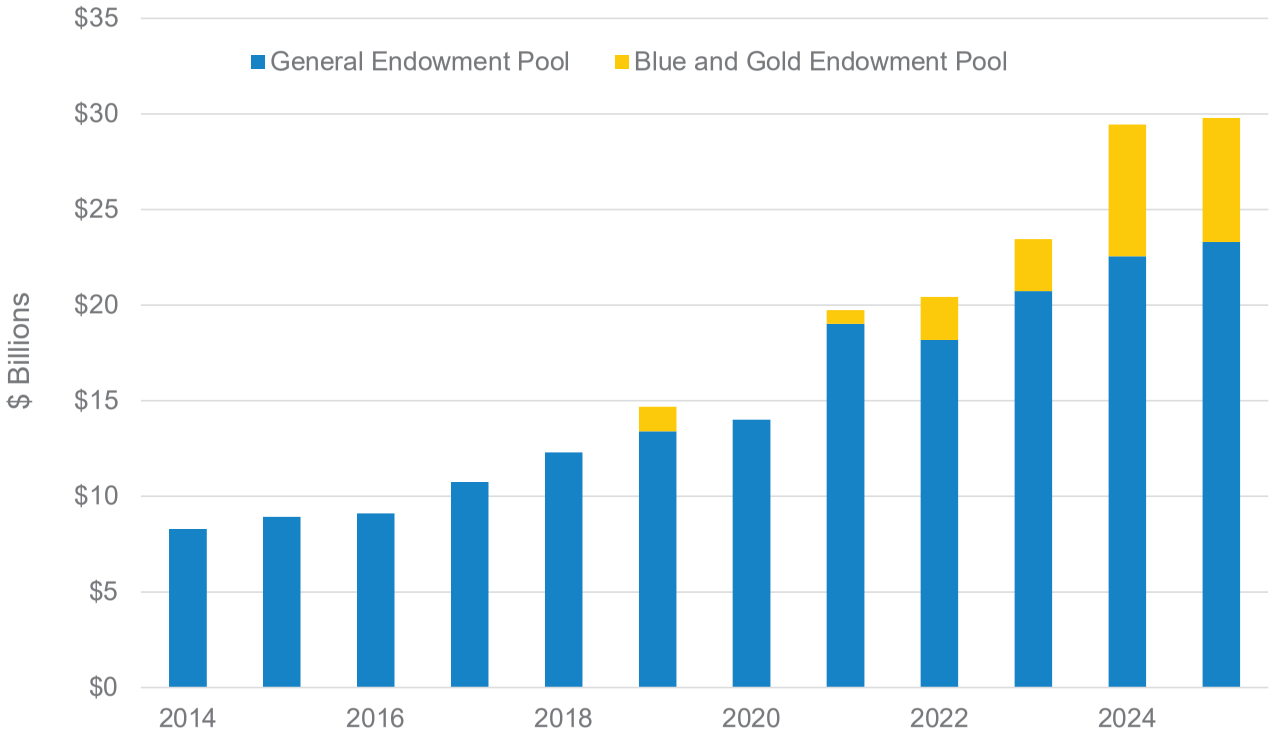
UC INVESTMENTS ASSETS

$185 Billion in Six Products as of March 31, 2025



UC Endowment Assets Growth

UC ENDOWMENT ASSETS 2014 – 2025



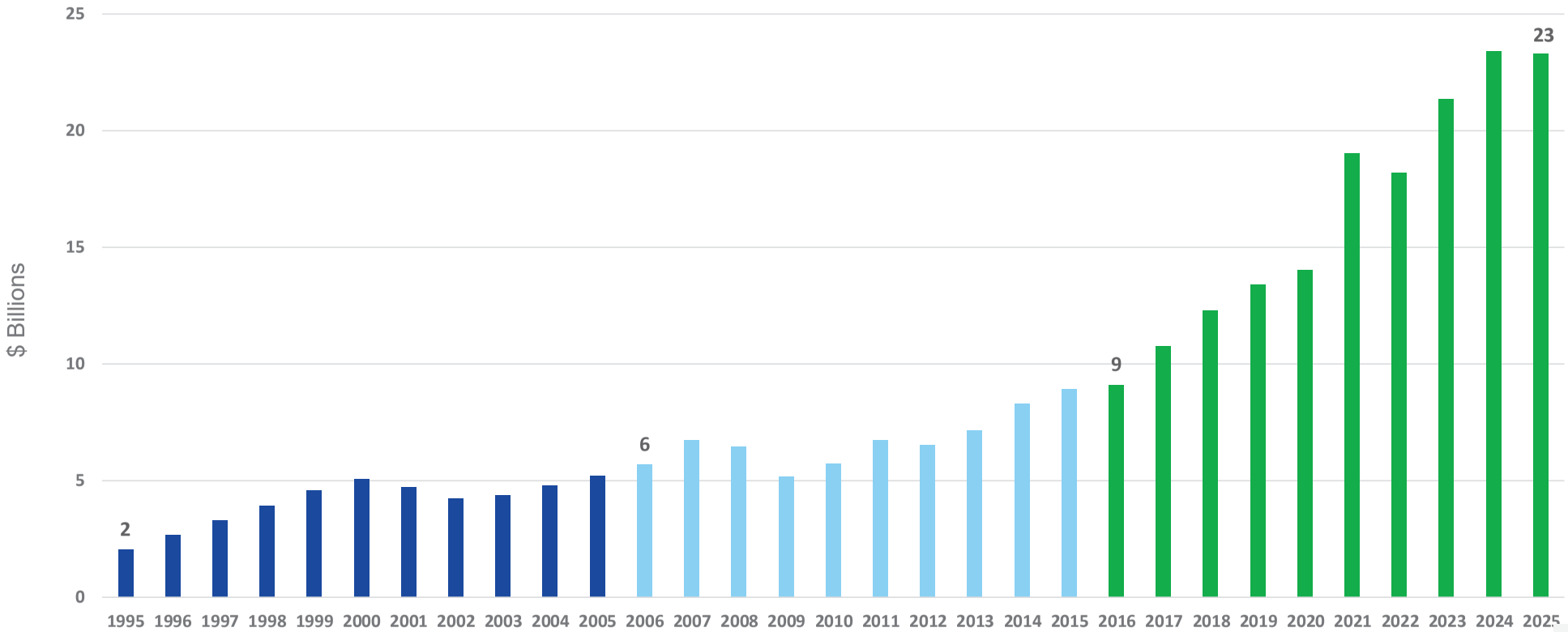
ASSET GROWTH

March 31, 2025

Today	$30B	Δ Change
1 Year Ago	$29B	+$1B
5 Years Ago	$15B	+$15B
10 Years Ago	$9B	+$21B

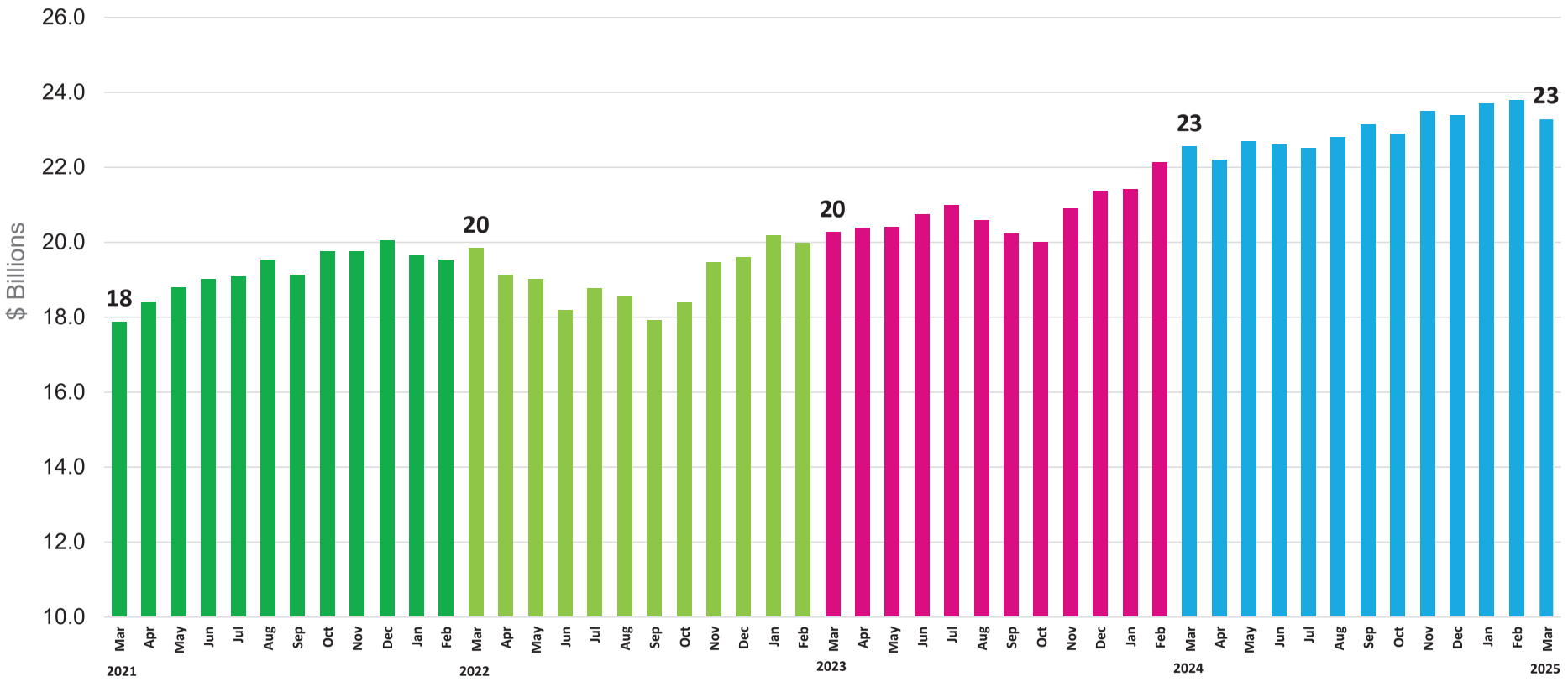
General Endowment Pool Grows by $21 Billion

30 Years

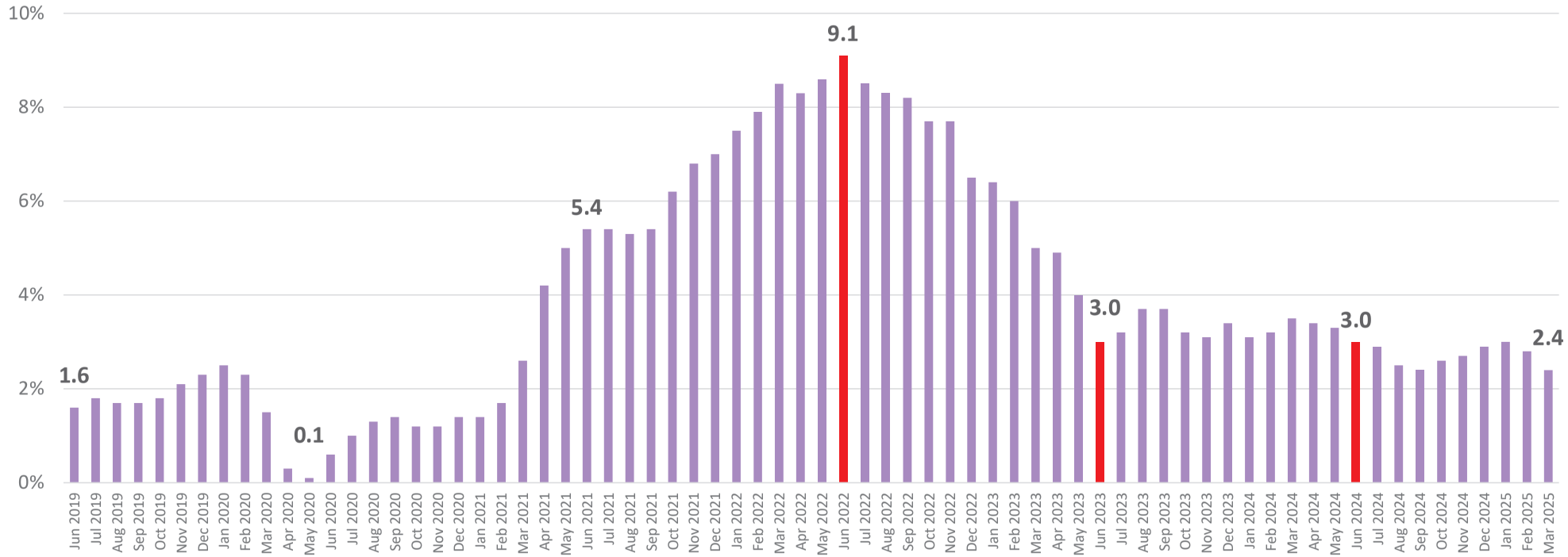


General Endowment Pool Grows by $5 Billion

4 Years

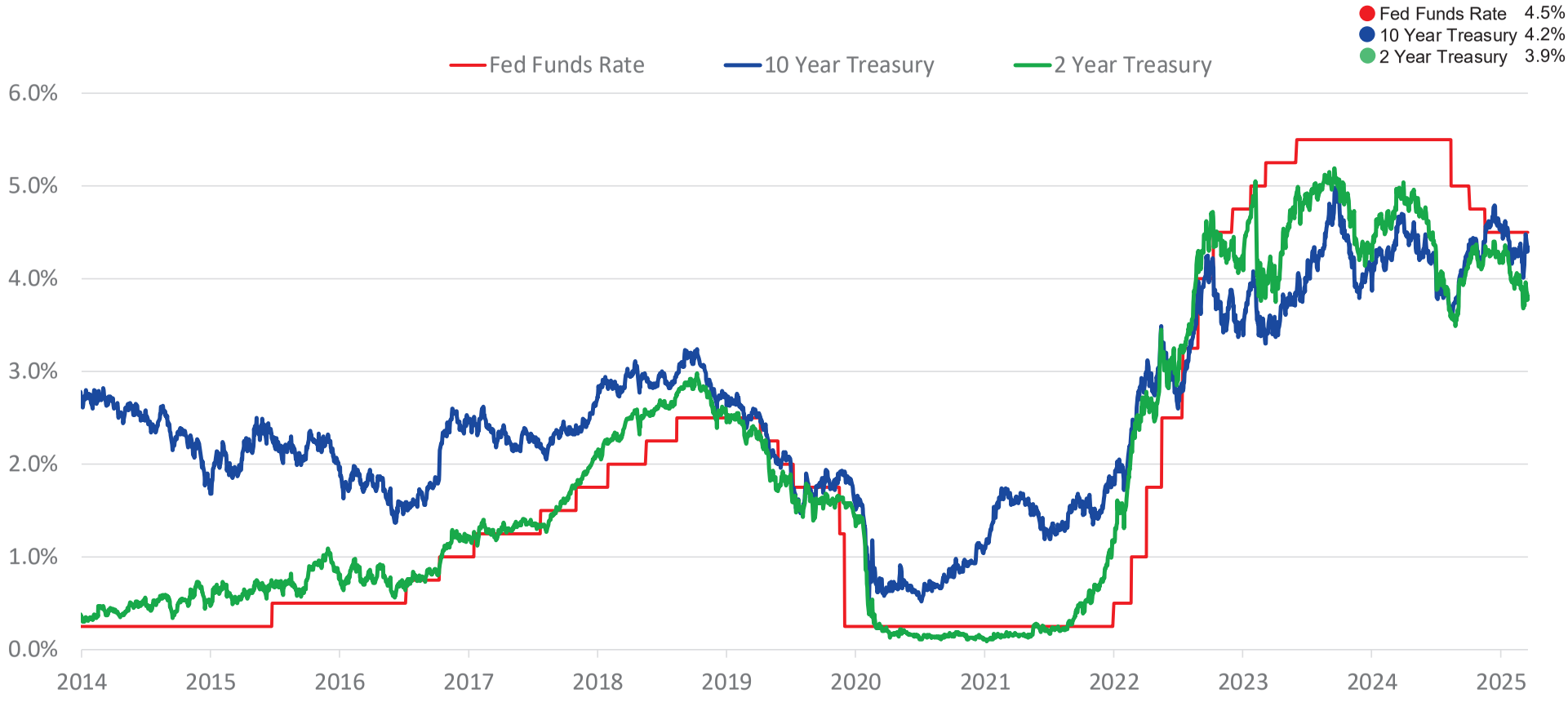


Inflation Trends Down



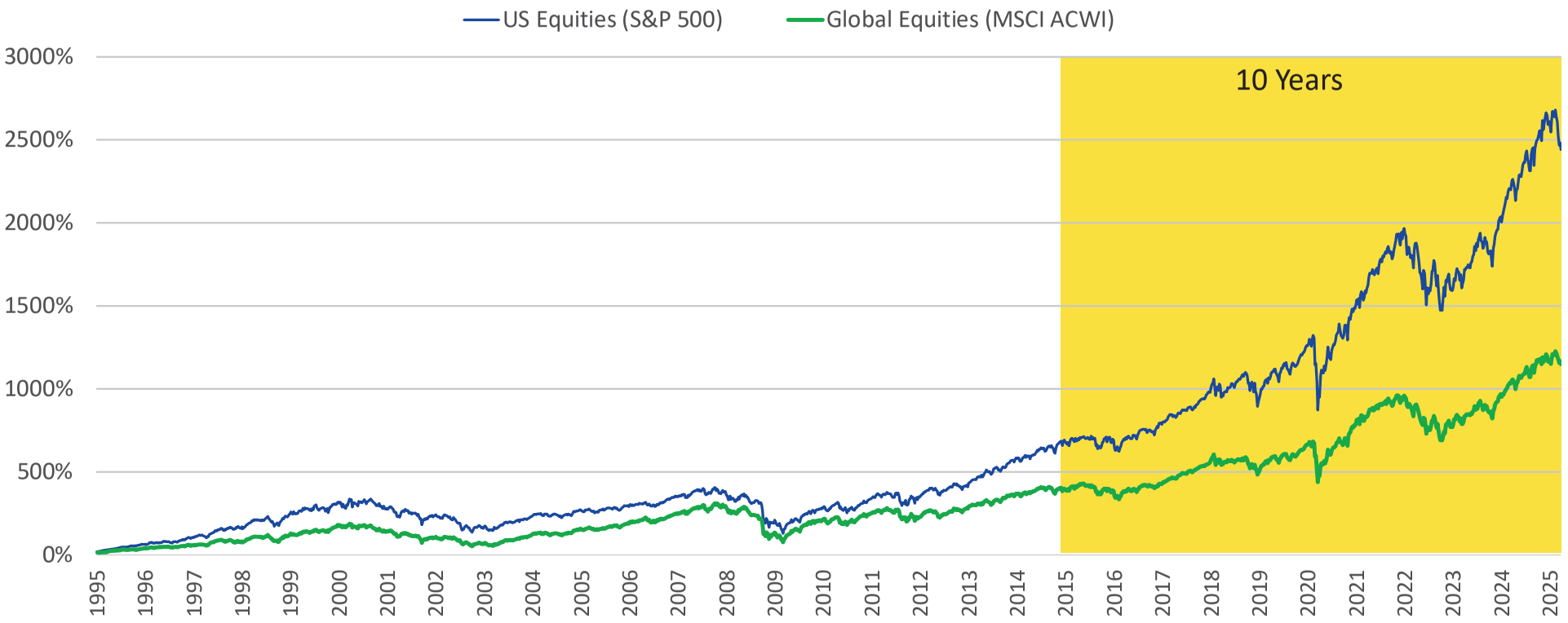
Source: Bloomberg

Fed Fund Rate Is 4.25% - 4.5%



Source: Bloomberg

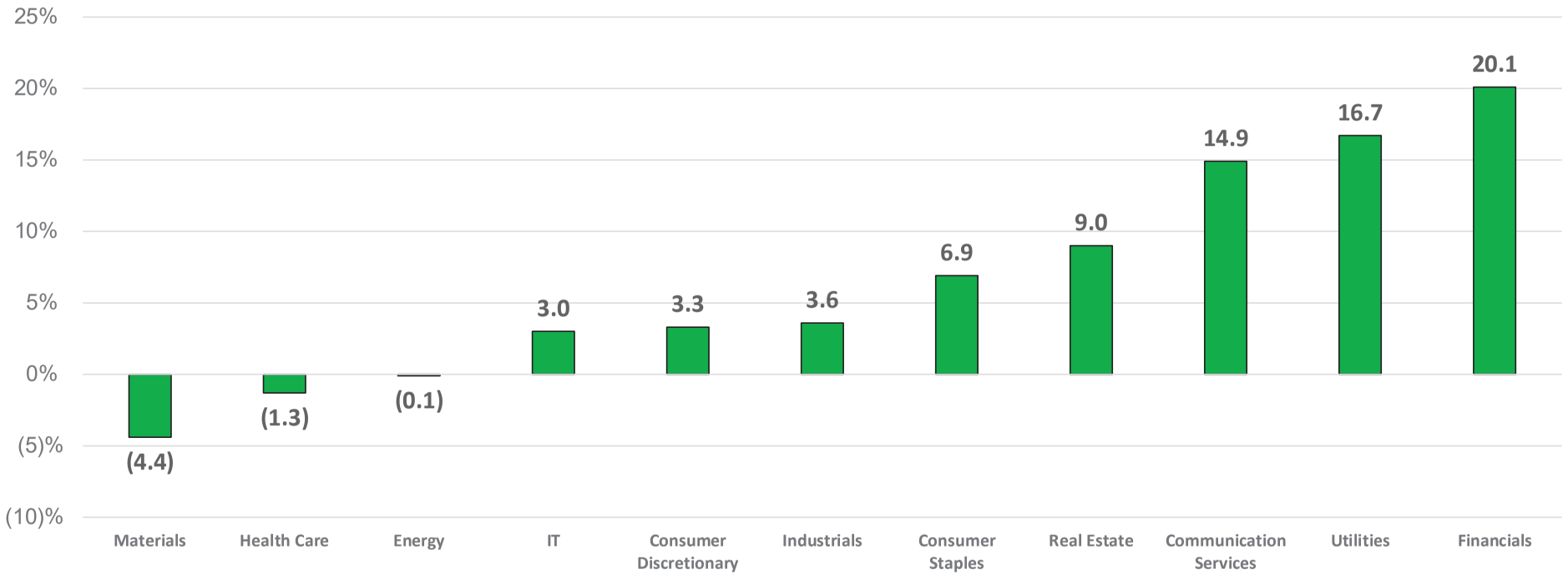
Global Equities Up 4.5% FY 2024/2025
30 Years



Source: Bloomberg

Global Equity Returns By Sector
1 Year

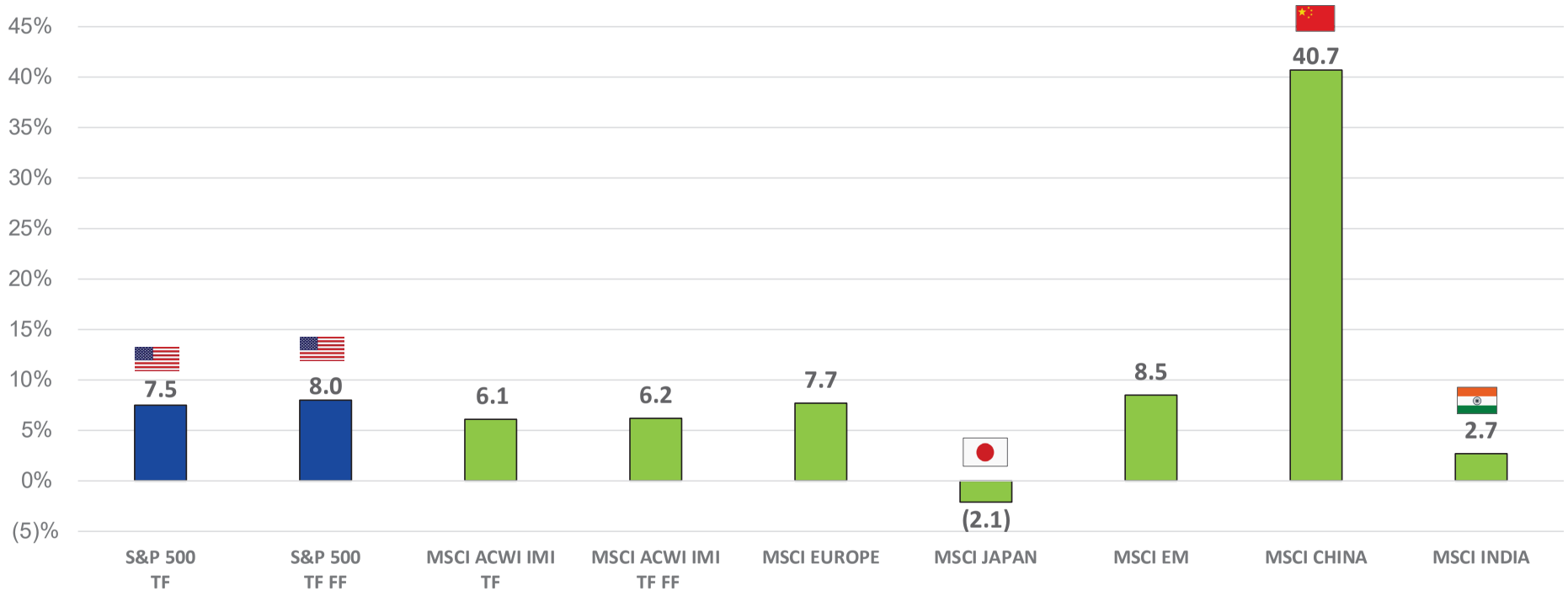
As of March 31, 2025



Source: Bloomberg

Global Equity Performance
1 Year

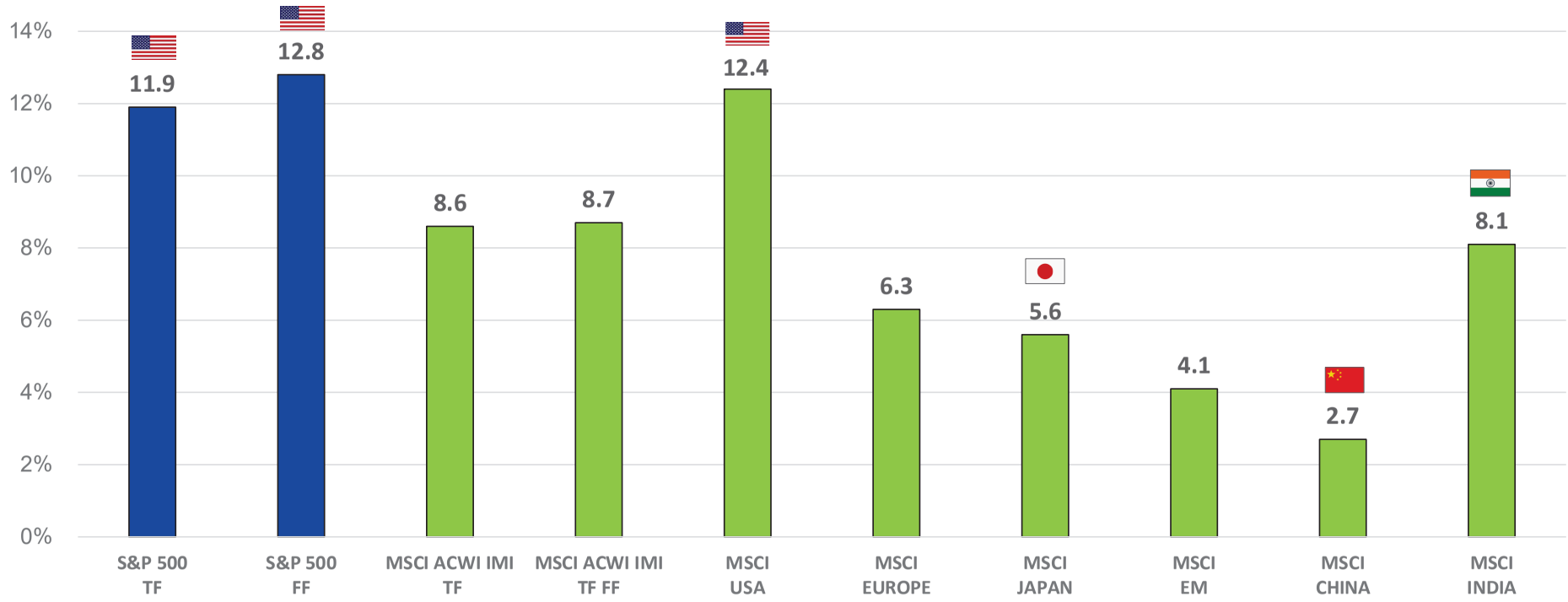
As of March 31, 2025



TF: Tobacco Free, FF: Fossil Fuel Free
Denominated in USD
Source: Bloomberg

Global Equity Performance
10 Years Annualized

As of March 31, 2025



TF: Tobacco Free, FF: Fossil Fuel Free
Denominated in USD
Source: Bloomberg

Assets Under Management
Fiscal Year To Date

Fiscal Year To Date (9 Months)	General Endowment Pool Market Value ($M)	Blue and Gold Endowment Pool Market Value ($M)	UC Endowment Total Market Value ($M)
June 30, 2024	22,564	6,891	29,455
Market Gains	973	266	1,239
Value Added	(25)	(1)	(26)
Net Cash Flow	(196)	(676)	(872)
March 31, 2025	23,316	6,480	29,796

General Endowment Pool: Asset Allocation

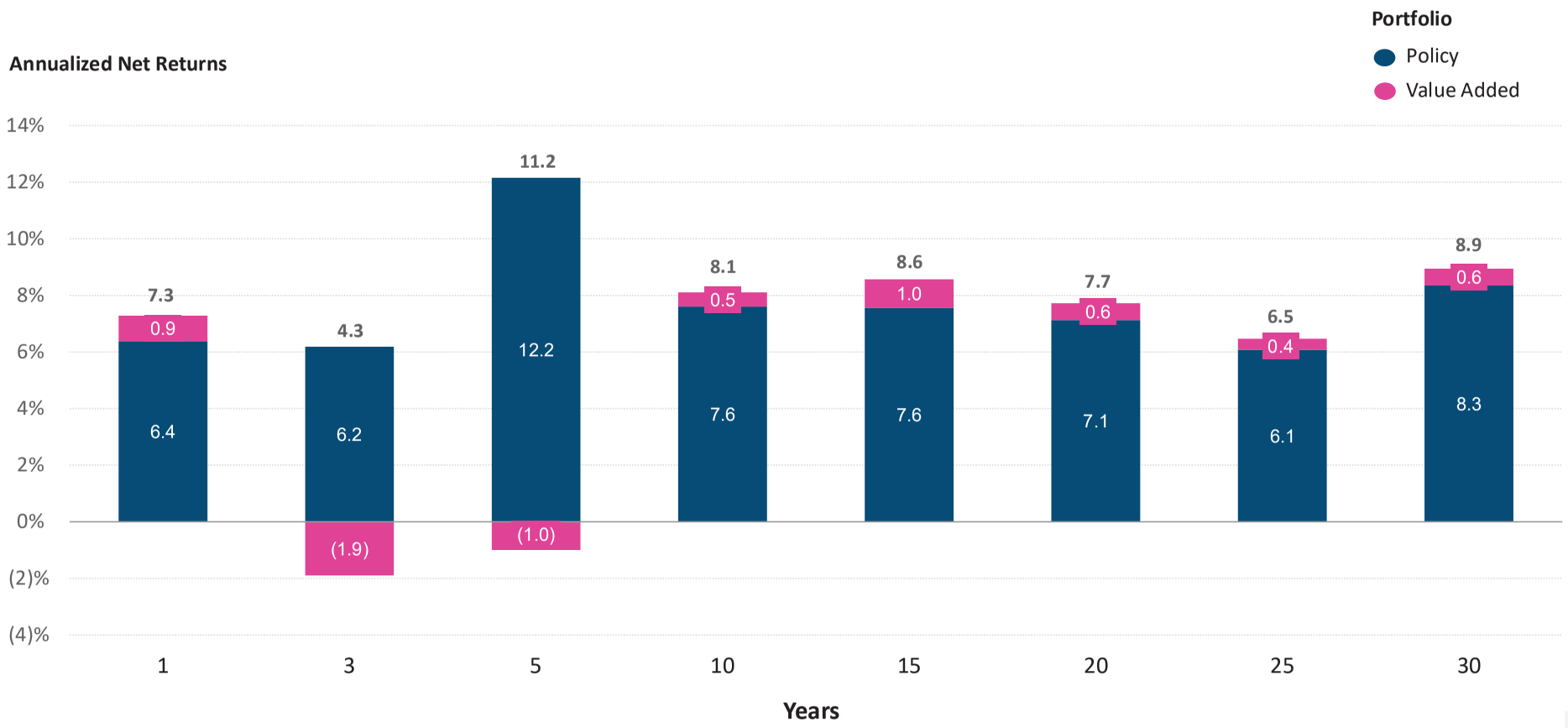
As of March 31, 2025

	Market Value ($M)	Weight (%)	Over/Underweight (%)	Policy (%)
Global Equity	**10,571**	**45.3**	**5.3**	**40**
Passive - Public Equity	7,207	30.9		
Active - Public Equity	3,364	14.4		
Fixed Income	**1,483**	**6.4**	**(1.6)**	**8**
Private Assets	**10,577**	**45.4**	**(4.6)**	**50**
Private Equity	5,832	25.0	1.0	24
Absolute Return *	351	1.5	(8.5)	10
Private Credit	871	3.8	(0.2)	4
Real Estate **	2,933	12.6	4.6	8
Real Assets	590	2.5	(1.5)	4
Cash	**685**	**2.9**	**0.9**	**2**
Total	**$23,316M**	**100%**		**100%**

* Allocation below average because we are redeeming the asset class.
** Real Estate includes our large transaction in 2023.

General Endowment Pool: Performance

As of March 31, 2025



General Endowment Pool: Performance

As of March 31, 2025

Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	3 Year	5 Year	10 Year	15 Year	20 Year	25 Year	30 Year
General Endowment Pool	23,316	100	4.3	7.3	4.3	11.2	8.1	8.6	7.7	6.5	8.9
Policy Benchmark*			4.4	6.4	6.2	12.2	7.6	7.6	7.1	6.1	8.3
Value Added			(0.1)	0.9	(1.9)	(1.0)	0.5	1.0	0.6	0.4	0.6

*The General Endowment Pool Benchmark is a weighted average of investment policy targets.
Returns greater than 1 year are shown on an annualized basis

Fiscal YTD Contribution to Return



General Endowment Pool: Policy Benchmark

Asset Class	Policy Benchmark Component	Policy (%)	Min Allowable Range (%)	Max Allowable Range (%)
Public Equity	MSCI All Country World Index (ACWI) Investable Market Index (IMI) Tobacco and Fossil Fuel Free - Net Dividends	40	30	50
Fixed Income	Bloomberg 1-5 Year Government/Credit Index	8	5	15
Private Assets				
Private Equity	Russell 3000 Index + 3%	24	10	30
Absolute Return	HFRI Fund of Funds Composite	10	5	15
Real Estate	NCREIFODCE Index Non Lagged	8	4	12
Real Assets	Actual Real Asset Portfolio Returns	4	0	8
Private Credit*	75% Credit Suisse Leveraged Loan Total Return / 25% BofA ML BB-B US High Yield Constrained Index FF + 1.5%	4	0	6
Cash	Bank of America 3-Month US Treasury Bill Index	2	1	5

*The benchmark provider is no longer calculating the custom version of this index, the standard version was used as of December 1, 2025.

As of March 31, 2025

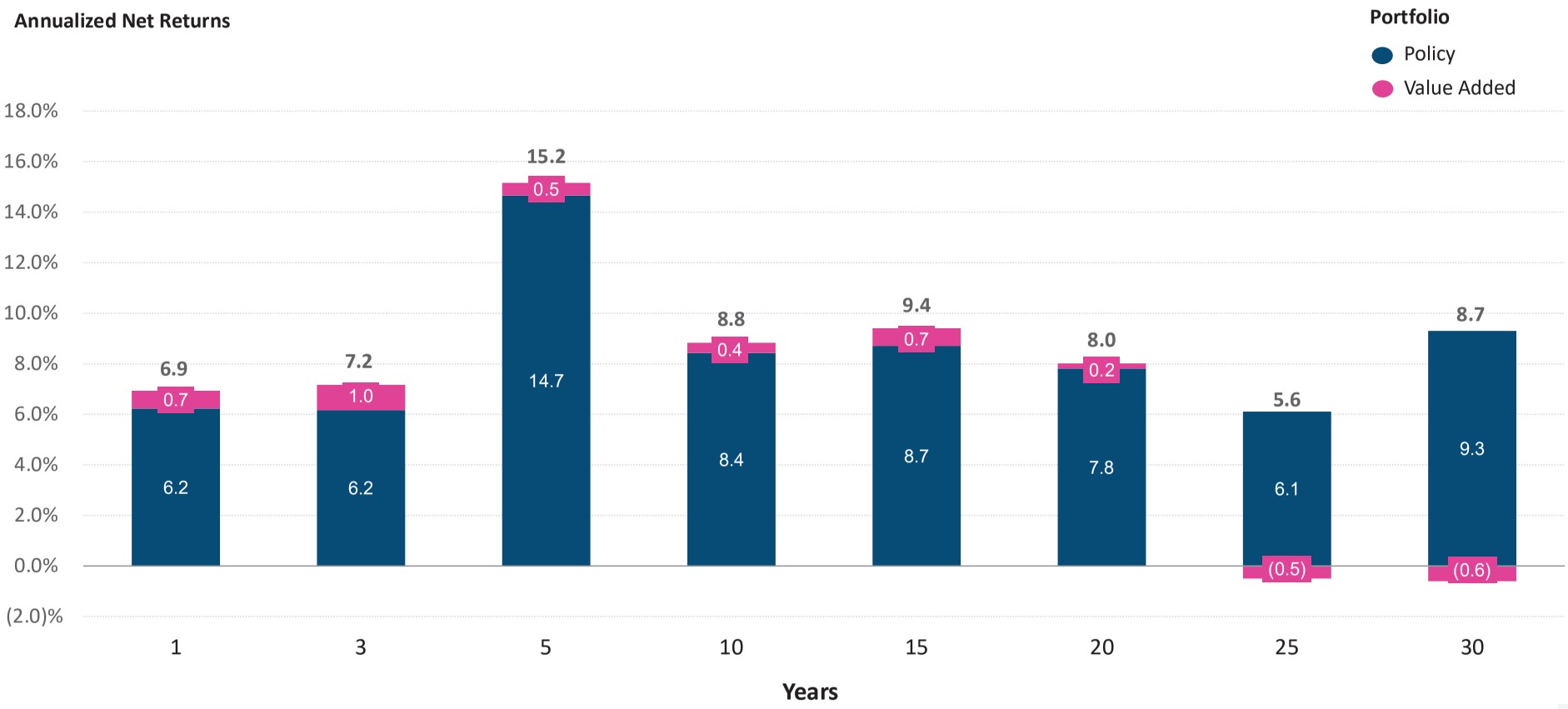
General Endowment Pool: Attribution – Fiscal Year to Date

Asset Class	Contribution To Return	Portfolio Return	Benchmark Return	Allocation Effect	Selection Effect	Total Attribution
Global Equity	**1.6%**	**3.5%**	**3.6%**	**0.0%**	**(0.1%)**	**(0.1%)**
Fixed Income	**0.4%**	**5.1%**	**4.8%**	**0.0%**	**0.0%**	**0.0%**
Private Assets	**2.2%**	**4.8%**	**4.9%**	**(0.1%)**	**0.0%**	**(0.1%)**
Private Equity	0.8%	3.2%	6.2%	0.0%	(0.8%)	(0.8%)
Absolute Return	0.4%	11.8%	3.7%	0.0%	0.3%	0.3%
Private Credit*	0.2%	6.3%	6.3%	0.0%	0.0%	0.0%
Real Estate	0.7%	5.9%	1.8%	(0.1%)	0.5%	0.4%
Real Assets	0.1%	2.7%	2.7%	0.0%	0.0%	0.0%
Cash	**0.1%**	**4.3%**	**3.6%**	**0.1%**	**0.0%**	**0.1%**
Total	**4.3%**	**4.3%**	**4.4%**	**0.0%**	**(0.1%)**	**(0.1%)**

* The benchmark provider is no longer calculating the custom version if this index, the standard version was used as of December 1, 2025.

Public Equity

As of March 31, 2025



Public Equity

As of March 31, 2025

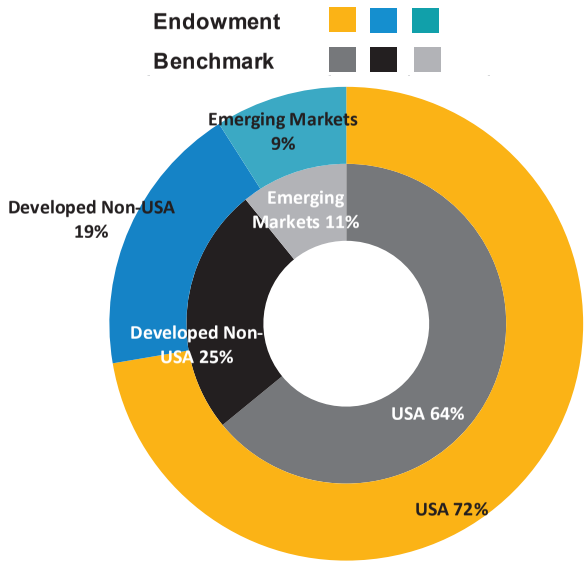
Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	3 Year	5 Year	10 Year	15 Year	20 Year	25 Year	30 Year
Public Equity	10,571	100	3.5	6.9	7.2	15.2	8.8	9.4	8.0	5.6	8.7
Policy Benchmark*			3.6	6.2	6.2	14.7	8.4	8.7	7.8	6.1	9.3
Value Added			(0.1)	0.7	1.0	0.5	0.4	0.7	0.2	(0.5)	(0.6)
Passive	7,207	68	3.8	7.1	7.5	16.5	-	-	-	-	-
Active**	3,364	32	2.7	7.3	6.7	13.8	-	-	-	-	-

* From July 1, 2020 the Public Equity benchmark is the MSCI ACWI IMI Tobacco and Fossil Fuel Free Index.
From July 1, 2017 to June 30, 2020 the Public Equity benchmark was the MSCI ACWI IMI Tobacco Free Index.
Prior to July 1, 2017, the Public Equity benchmark was an aggregate of benchmarks for underlying equity portfolios.
** Active weight also includes direct investments.
Returns greater than 1 year are shown on an annualized basis

Active Managers	# of funds	Weight
Global Generalist	1	5.9%
USA	2	6.9%
Developed Non-USA	1	0.7%
Emerging Markets	1	1.8%
	5	**15.3%**

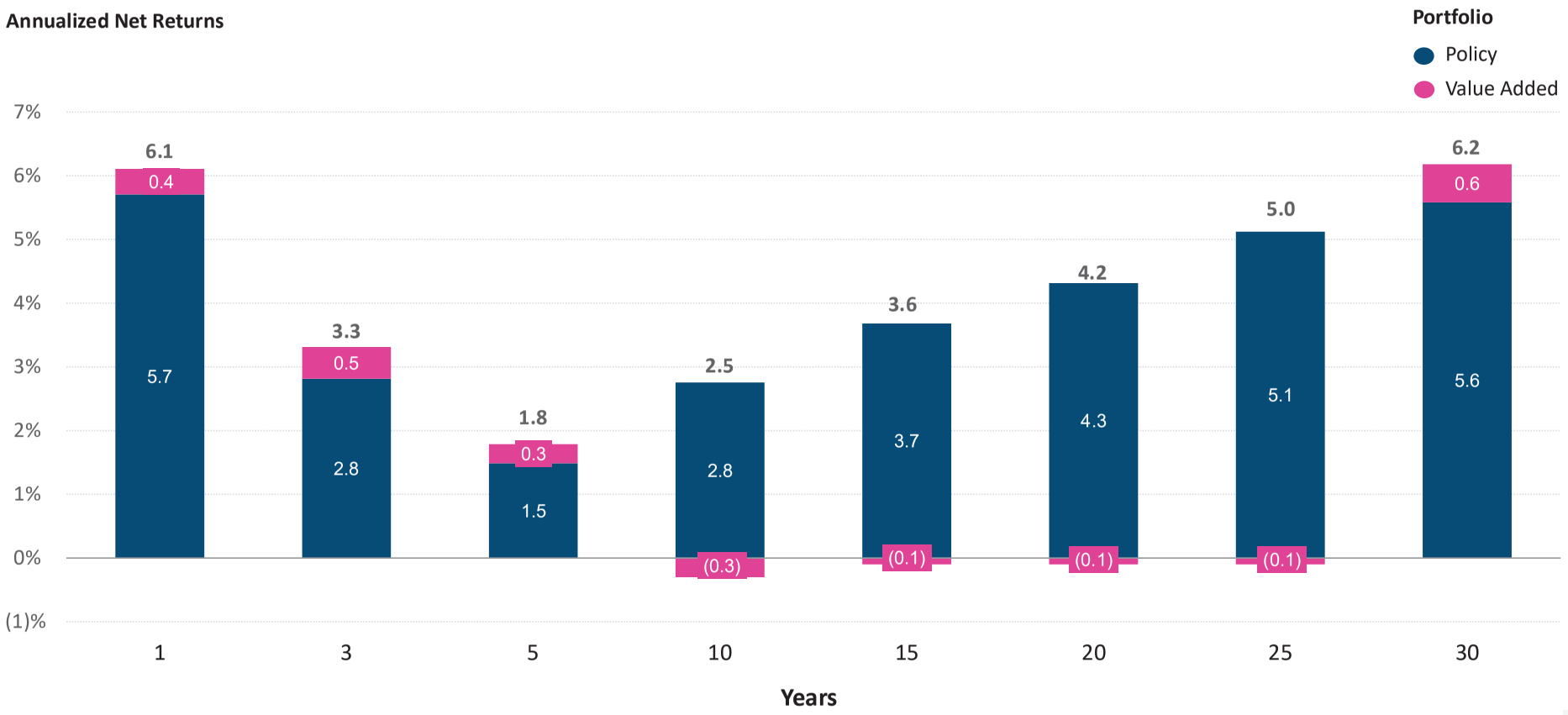
Index Exposure	Strategy	Weight
S&P 500 Tobacco and Fossil Fuel Free	US Index	15.2%
MSCI ACWI IMI Tobacco and Fossil Fuel Free	Global Index	68.2%

Geographic Exposure



Fixed Income

As of March 31, 2025

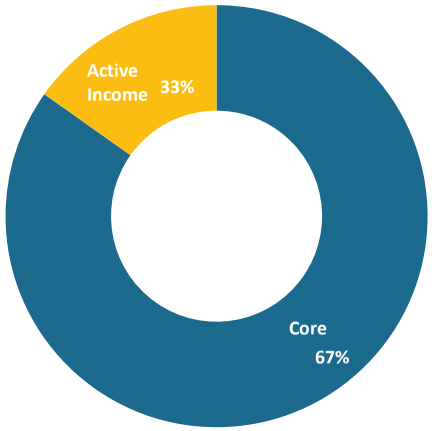


Fixed Income

As of March 31, 2025

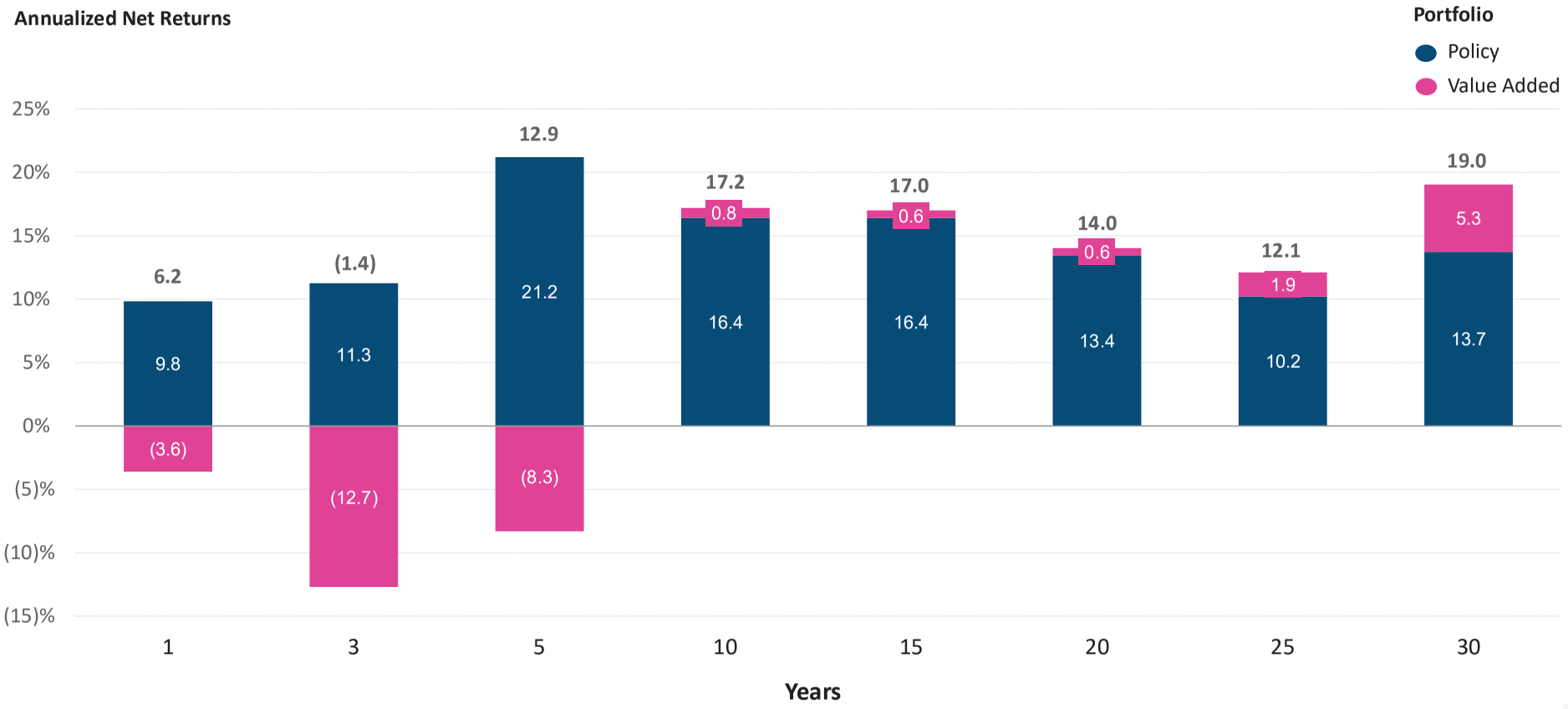
Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	3 Year	5 Year	10 Year	15 Year	20 Year	25 Year	30 Year
Fixed Income	1,483	100	5.1	6.1	3.3	1.8	2.5	3.6	4.2	5.0	6.2
Policy Benchmark*			4.8	5.7	2.8	1.5	2.8	3.7	4.3	5.1	5.6
Value Added			0.3	0.4	0.5	0.3	(0.3)	(0.1)	(0.1)	(0.1)	0.6

* From July 1, 2020, the benchmark is the Bloomberg 1-5 Year Government/Credit Index.
From July 1, 2017 to June 30, 2020, the benchmark is the Barclay's US Aggregate Bond Index.
Policy benchmark for Liquidity (Income) prior to July 1, 2017 was a weighted average composite of the historical policy benchmarks and targets.
Returns greater than 1 year are shown on an annualized basis.



Private Equity

As of March 31, 2025

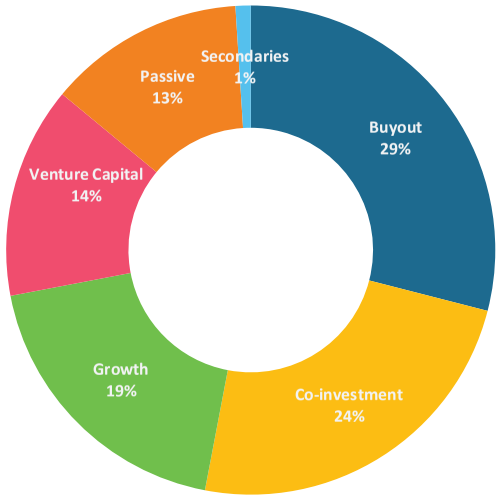


Private Equity

As of March 31, 2025

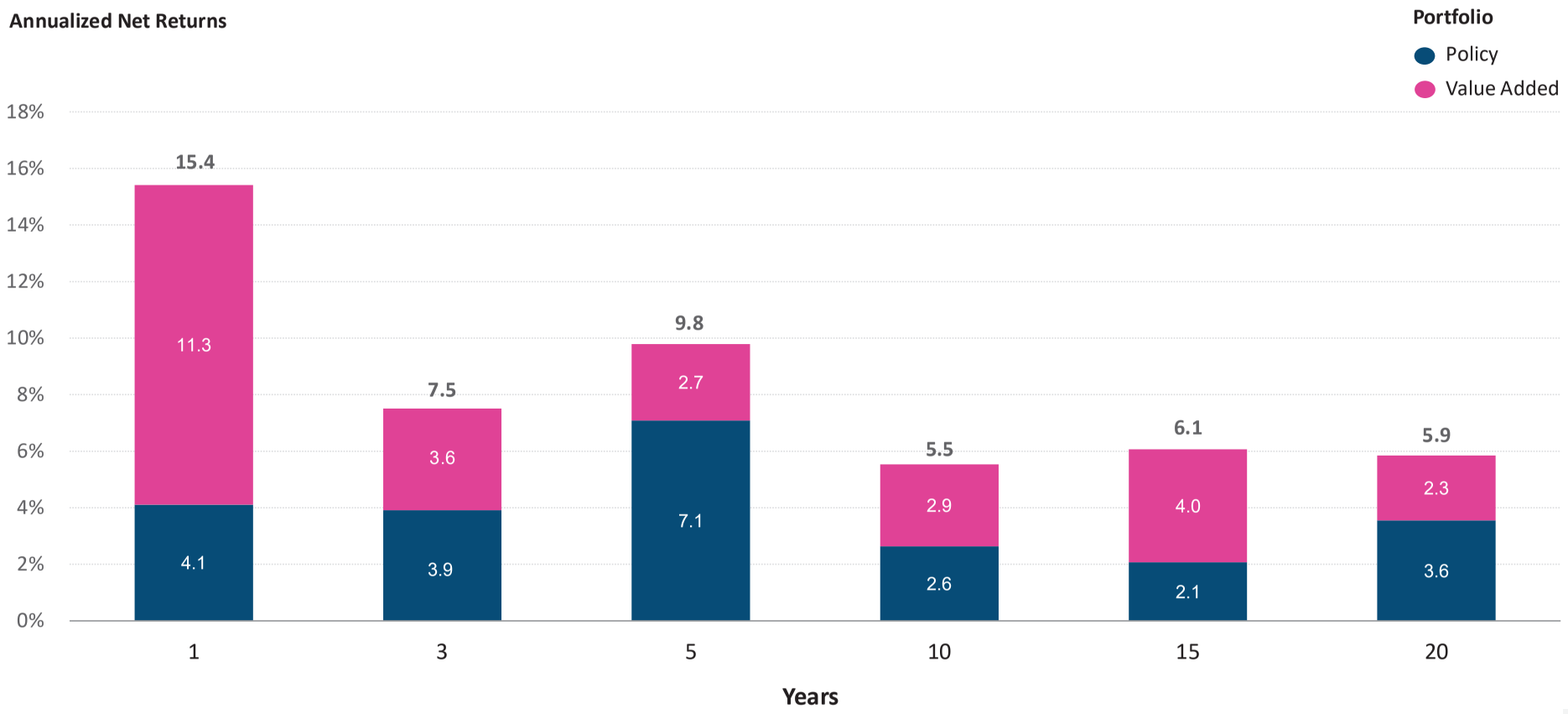
Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	3 Year	5 Year	10 Year	15 Year	20 Year	25 Year	30 Year
Private Equity	5,832	100	3.2	6.2	(1.4)	12.9	17.2	17.0	14.0	12.1	19.0
Policy Benchmark*			6.2	9.8	11.3	21.2	16.4	16.4	13.4	10.2	13.7
Value Added			(3.0)	(3.6)	(12.7)	(8.3)	0.8	0.6	0.6	1.9	5.3
Buyout	1,683	29	5.4	8.8	5.1	16.5	18.6	16.4	16.2	-	-
Co-investment	1,380	24	5.2	12.1	0.9	12.1	19.5	21.1	-	-	-
Growth	1,130	19	4.5	3.6	(3.4)	12.9	12.2	13.1	-	-	-
Venture Capital	850	14	(0.8)	1.3	(9.0)	10.5	14.5	15.0	11.9	(0.2)	(0.4)
Passive	742	13	(0.4)	-	-	-	-	-	-	-	-
Secondaries	47	1	(5.9)	(1.2)	(2.6)	16.0	-	-	-	-	-

* As of July 1, 2021, the Private Equity policy benchmark is the Russell 3000 Index +3%.
From July 1, 2020 to June 30, 2021, the Private Equity policy benchmark is the Russell 3000 Index +2.5%.
From July 1, 2019 to June 30, 2020, the Private Equity policy benchmark is the Russell 3000 Index +2.0%.
From July 1, 2017 to June 30, 2019, the Private Equity policy benchmark is the Russell 3000 Index +1.5%.
From March 2005 to June 2017, the Private Equity benchmark was the actual private equity return.
From January 2001 to February 2005, the Private Equity benchmark was Russell 3000 Index + 3% lagged one quarter.
Prior to that, it was the S&P 500 Index + 5% lagged by a quarter.
Returns greater than 1 year are shown on an annualized basis.



Absolute Return

As of March 31, 2025

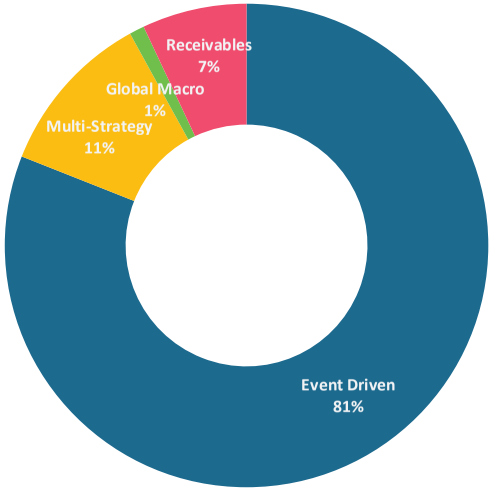


Absolute Return

As of March 31, 2025

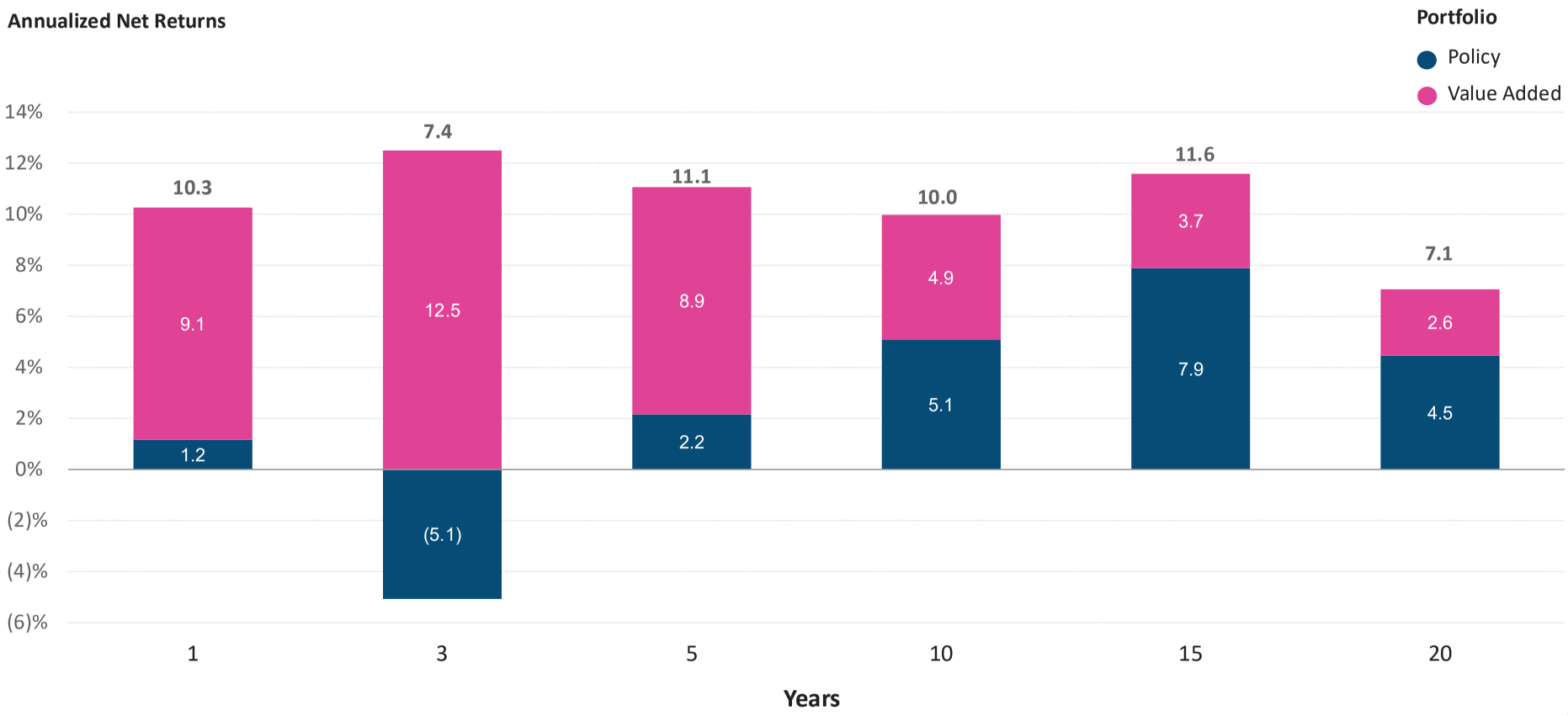
Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	3 Year	5 Year	10 Year	15 Year	20 Year
Absolute Return	351	100	11.8	15.4	7.5	9.8	5.5	6.1	5.9
Policy Benchmark*			3.7	4.1	3.9	7.1	2.6	2.1	3.6
Value Added			8.1	11.3	3.6	2.7	2.9	4.0	2.3
Event Driven	286	81	25.6	31.6	17.2	18.8	10.1	9.6	8.2
Multi-Strategy	37	11	(0.9)	3.0	2.9	7.3	3.1	-	-
Global Macro	4	1	16.8	10.3	14.8	10.0	3.5	3.6	-
Receivables	24	7	-	-	-	-	-	-	-

* As of July 1, 2017, the benchmark is HFRI Fund of Funds Composite.
From March 1, 2016 to June 1, 2017, the benchmark was the HFRX Absolute Return.
From April 1, 2009 to February 1, 2016, the benchmark was 50% HFRX Absolute Return/50% HFRX Market Directional.
Prior to that, benchmark was 1 Month T-Bill+4.5%.
Returns greater than 1 year are shown on an annualized basis



Real Estate

As of March 31, 2025

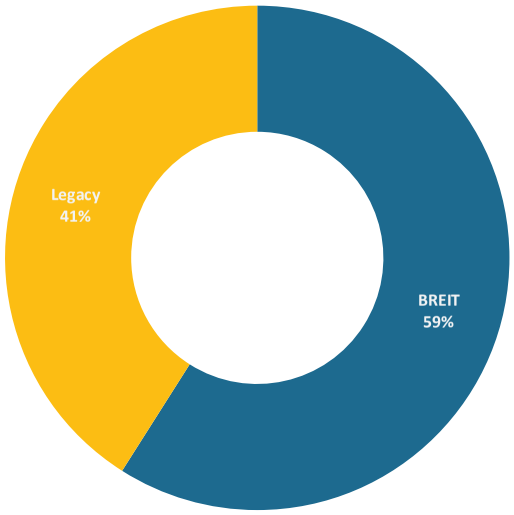


Real Estate

As of March 31, 2025

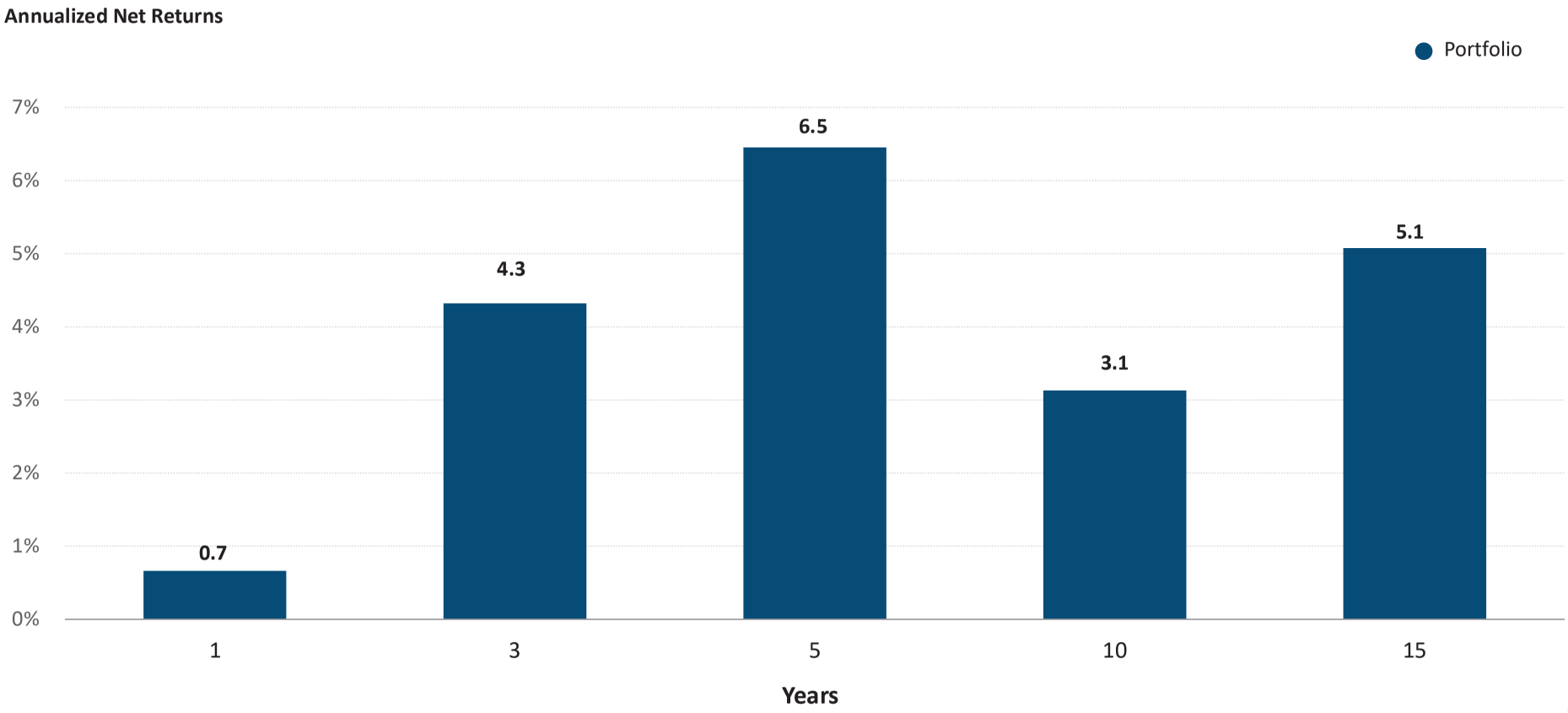
Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	3 Year	5 Year	10 Year	15 Year	20 Year
Real Estate	2,933	100	5.9	10.3	7.4	11.1	10.0	11.6	7.1
Policy Benchmark*			1.8	1.2	(5.1)	2.2	5.1	7.9	4.5
Value Added			4.1	9.1	12.5	8.9	4.9	3.7	2.6
BREIT	1,717	59	7.0	11.3	-	-	-	-	-
Legacy	1,216	41	4.2	8.8	4.5	9.4	9.2	11.0	6.7

* As of July 1, 2020, the Real Estate policy benchmark is the NCREIFODCE Index (non-lagged).
From April 1, 2011 to June 30, 2020, the Real Estate policy benchmark was the NCREIFODCE Index (lagged).
Returns greater than 1 year are shown on an annualized basis



Real Assets

As of March 31, 2025

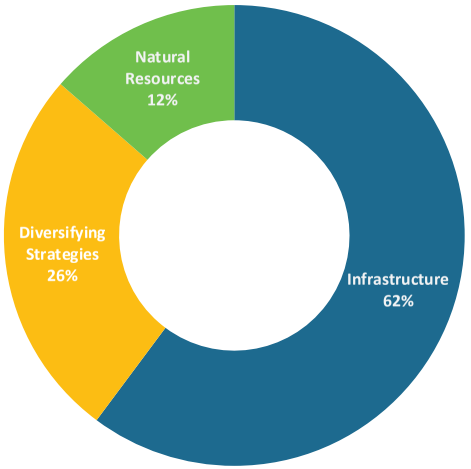


Real Assets

As of March 31, 2025

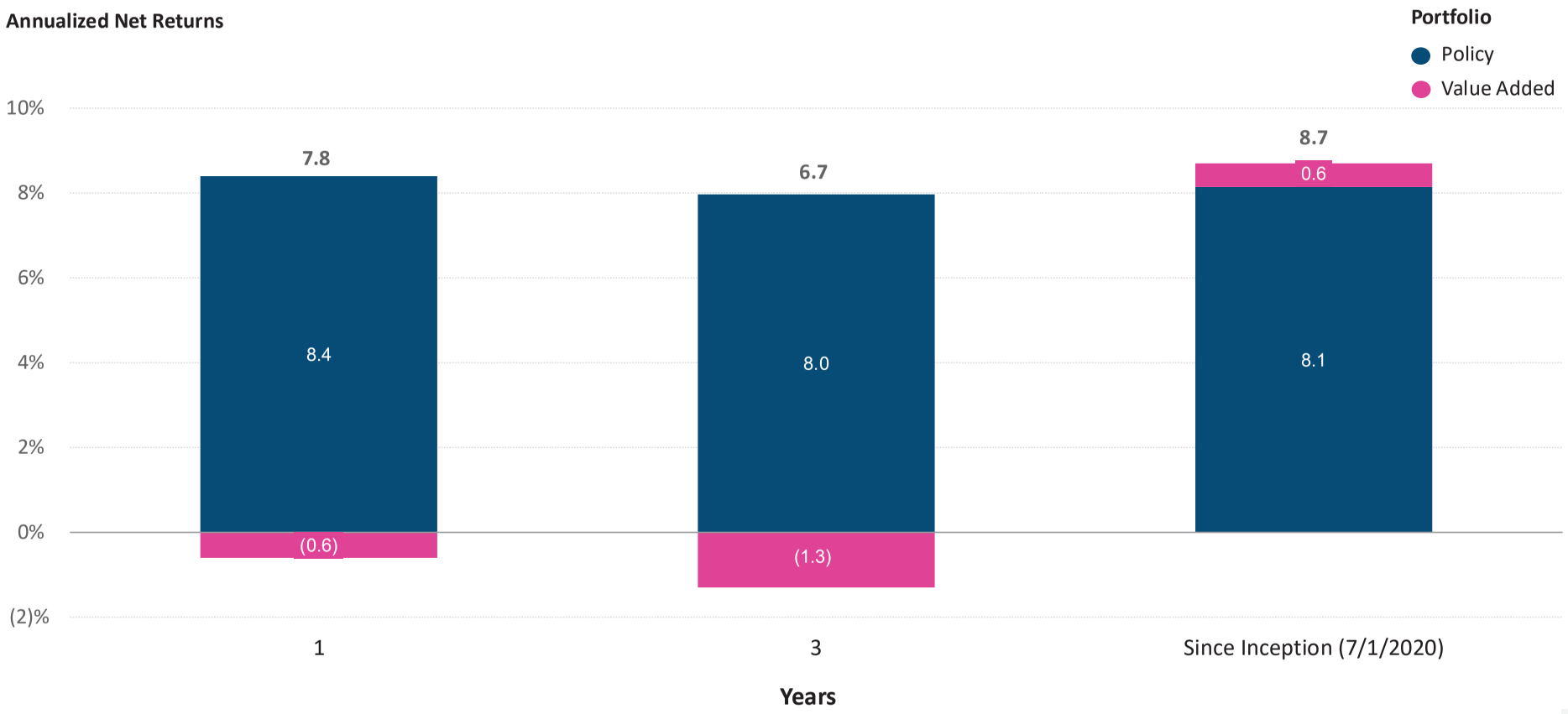
Net Returns (%)	Market Value ($M)	Weight(%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	3 Year	5 Year	10 Year	15 Year
Real Assets	590	100	2.7	0.7	4.3	6.5	3.1	5.1
Infrastructure	363	62	2.5	0.6	3.2	6.8	8.9	-
Diversifying Strategies	157	26	7.1	7.2	9.6	9.5	6.8	-
Natural Resources	70	12	(5.2)	(10.1)	1.7	2.3	(2.2)	0.6

* Inception date for Real Assets is April 1, 2010.
The Real Assets policy benchmark is the Real Assets portfolio return.
Returns greater than 1 year are shown on an annualized basis.



Private Credit

As of March 31, 2025

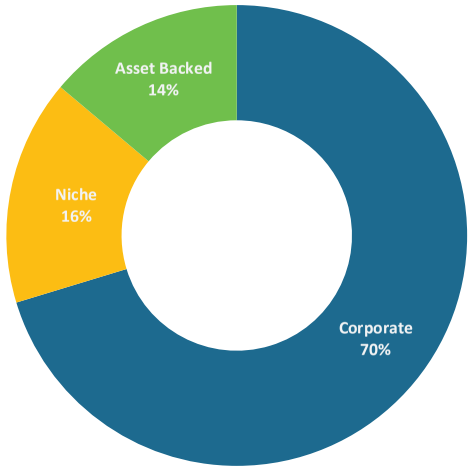


Private Credit

As of March 31, 2025

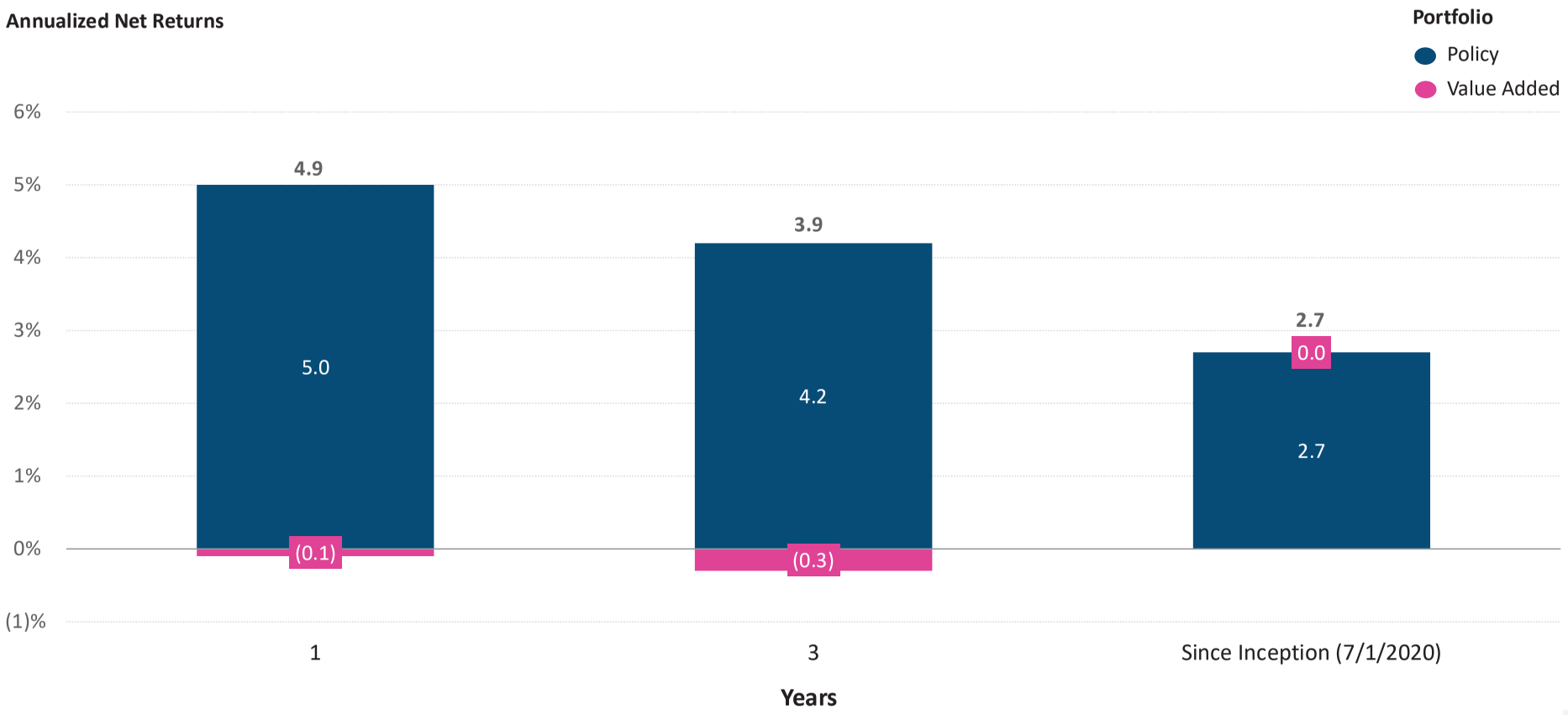
Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	Annualized Returns 3 Year	Since Inception (7/1/2020)
Private Credit	871	100	6.3	7.8	6.7	8.7
Policy Benchmark*			6.3	8.4	8.0	8.1
Value Added			0.0	(0.6)	(1.3)	0.6
Corporate	615	70	7.5	9.7	7.8	9.7
Niche	138	16	1.0	2.5	2.4	-
Asset Backed	118	14	7.5	7.1	6.5	-

* As of December 1, 2024, the Private Credit policy benchmark is 75% Credit Suisse Leveraged Loan Index / 25% Bank of America Merrill Lynch U.S. High Yield BB-B Constrained Fossil Free Index + 1.5%
As of July 1, 2020 to November 30, 2024, the Private Credit policy benchmark is 75% Credit Suisse Leveraged Loan Fossil Free Index / 25% Bank of America Merrill Lynch U.S. High Yield BB-B Constrained Fossil Free Index + 1.5%
Returns greater than 1 year are shown on an annualized basis.



Cash

As of March 31, 2025



Cash

As of March 31, 2025

Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Returns 1 Year	Annualized Returns 3 Year	Since Inception (7/1/2020)
Cash	685	100	4.3	4.9	3.9	2.7
Policy Benchmark*			3.6	5.0	4.2	2.7
Value Added			0.7	(0.1)	(0.3)	-

* As of July 1, 2020, the Cash policy benchmark is the Bank of America 3-Month US Treasury Bill Index.
Table showing cash returns since establishment of the formal policy benchmark.
Returns greater than 1 year are shown on an annualized basis.

GEP Risk

As of March 31, 2025

Portfolio volatility increased slightly in 2025 Q1. Active risk increased slightly. Improvements in modeling underlying real estate exposures and leverage were the main causes of increases, somewhat offset by declines in risk in other asset classes.

			Portfolio Risk (%)		Benchmark Risk (%)		Active Risk (%)	
Portfolio	Benchmark	Weight (%)	Standalone Volatility	QoQ Change	Standalone Volatility	QoQ Change	Tracking Error	QoQ Change
Endowment	Policy (Blend)	100.0	12.7	0.2	11.0	(0.3)	3.3	0.3
Public Equity	ACWI IMI TF FF	45.3	14.5	(0.4)	14.5	(0.5)	0.7	0.0
Fixed Income	BBG 1-5yr G/C	6.4	3.6	0.2	2.6	(0.1)	2.6	0.6
Absolute Return	HFRI FOF	1.5	3.0	(2.2)	2.5	(0.3)	3.2	(1.6)
Private Equity	R3K + 3%	25.0	17.8	(0.0)	15.5	(0.2)	11.1	(0.2)
Real Estate	NFI ODCE	12.6	19.9	7.0	17.2	(1.5)	5.0	(3.2)
Real Assets	Real Assets	2.5	14.0	(0.2)	14.0	(0.2)	0.0	0.0
Private Credit	CS LL/ML HY BB-B	3.7	8.4	(4.3)	4.7	(0.4)	5.8	(4.2)
Cash	BofA 3mo TBill	2.9	0.1	(0.0)	0.1	(0.0)	0.1	(0.0)

WHAT KEEPS US UP AT NIGHT?

June 2022	June 2023	June 2024	Today
Market Volatility / Liquidity	Artificial Intelligence	US Politics	Market Volatility
War / Russia / Ukraine	Inflation	War / Russia / Ukraine	Tariffs
Interest Rates / Fed	Interest Rates / Fed	Middle East War	Inflation
Inflation / Energy Prices	Economic Slowdown	Artificial Intelligence	US Dollar
Recession	US Politics	Climate Change	Interest Rate
Supply Chain Disruption	China / Geopolitics / US	Demographics	Stagflation
Deglobalization	Extreme Effects of Climate Change	China / Geopolitics / US	Recession?
Technology / Valuations	War / Russia / Ukraine	Deglobalization	
China / Geopolitics / US			
COVID			
Climate Change / ESG			

Blue and Gold Endowment Pool

Assets Under Management

Fiscal Year To Date (9 Months)	Market Value ($M)
June 30, 2024	6,891
Market Gains	266
Value Added	(1)
Net Cash Flow	(676)
March 31, 2025	6,480

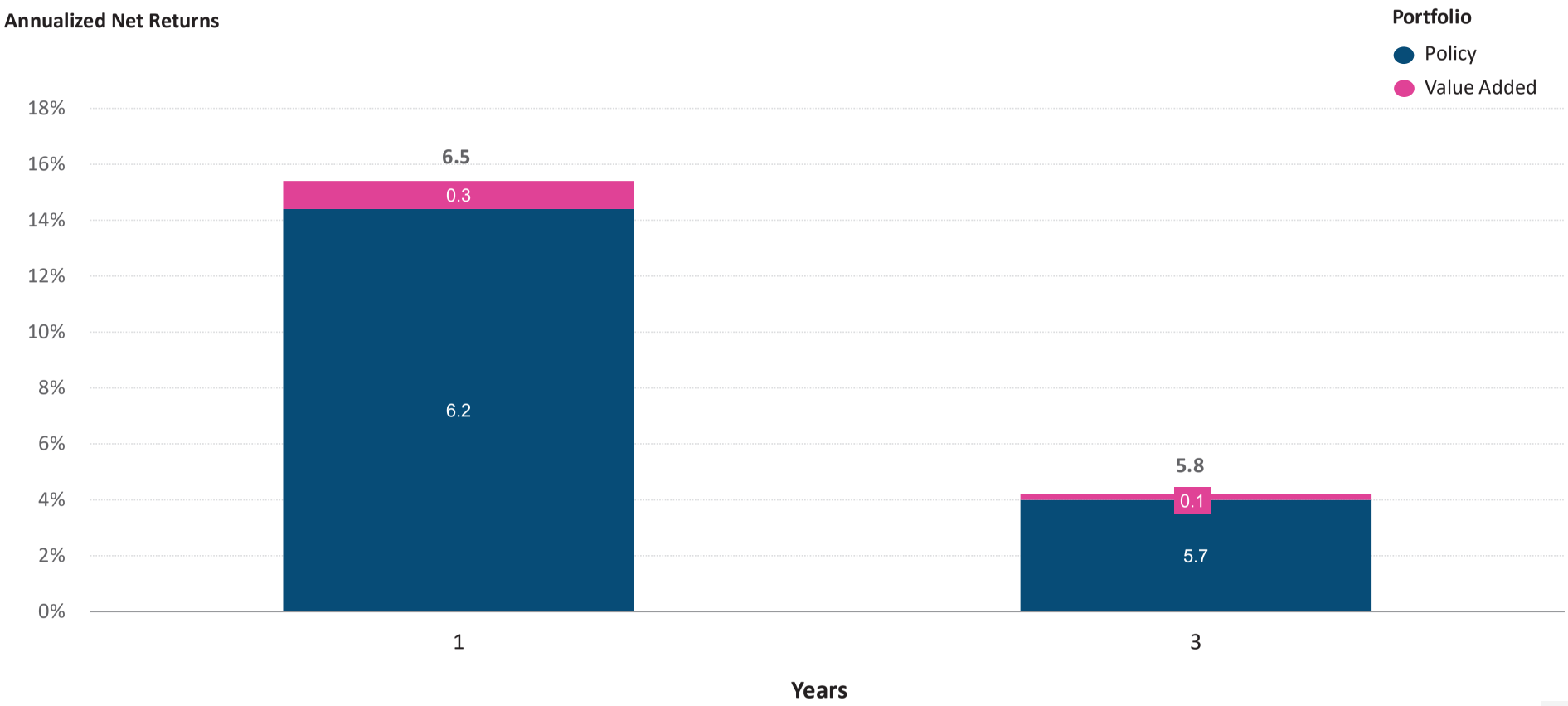
Blue and Gold Endowment Pool: Asset Allocation

As of March 31, 2025

	Market Value ($M)	Weight (%)	Over/Underweight to Policy (%)	Policy (%)
Public Equity	5,856	90	10.0	80
Fixed Income	624	10	(10.0)	20
Total	**$6,480M**	**100%**		**100%**

Blue and Gold Endowment Pool: Performance

As of March 31, 2025

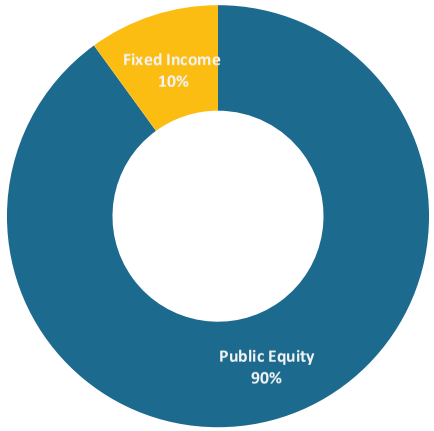


Blue and Gold Endowment Pool: Performance

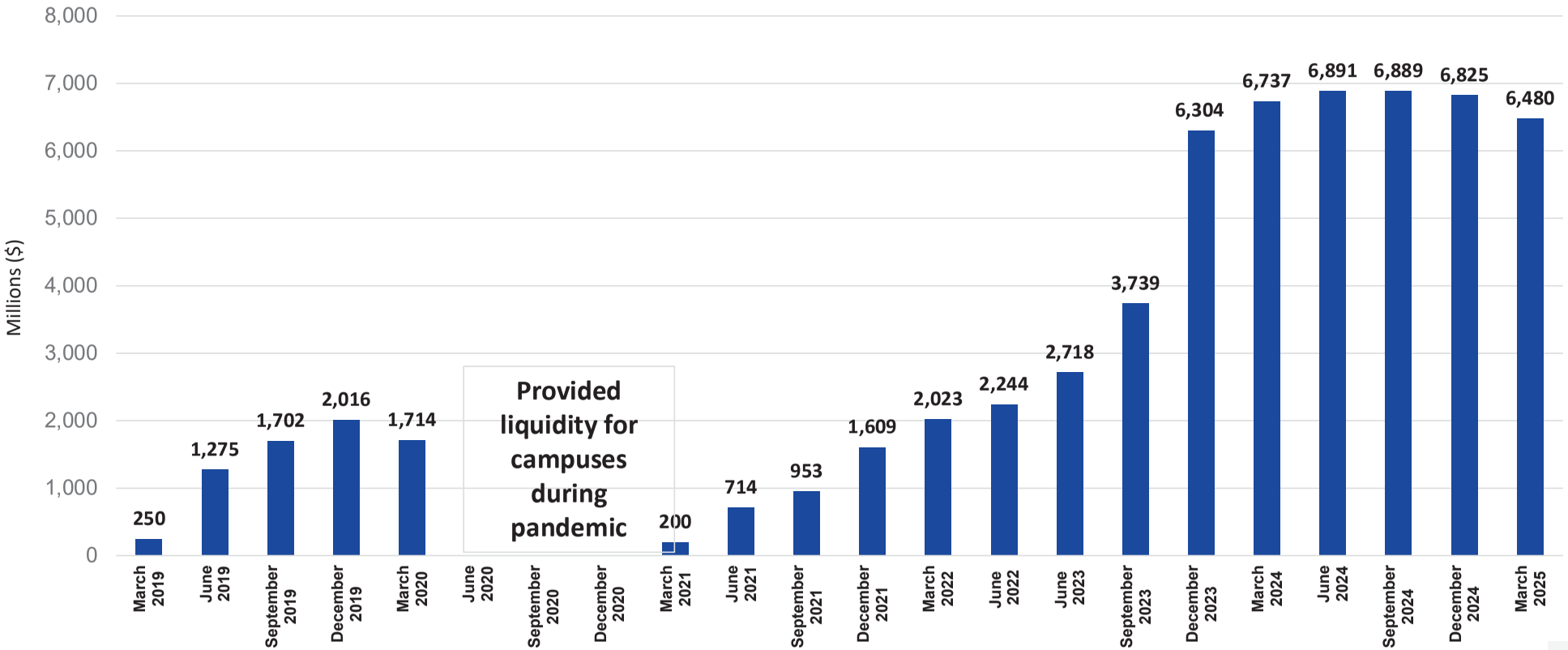
As of March 31, 2025

Net Returns (%)	Market Value ($M)	Weight (%)	Fiscal YTD 9 Months	Annualized Return 1 Year	Annualized Return 3 Year
Blue and Gold Endowment Pool	6,480	100	4.0	6.5	5.8
Policy Benchmark*			4.0	6.2	5.7
Value Added			0.0	0.3	0.1
Public Equity	5,856	90	3.9	6.6	6.6
Policy Benchmark*			3.6	6.2	6.2
Value Added			0.3	0.4	0.4
Fixed Income	624	10	5.0	5.9	2.9
Policy Benchmark*			4.8	5.7	2.8
Value Added			0.2	0.2	0.1

*The Blue and Gold Benchmark is a weighted average consisting of each of the monthly returns of the MSCI All Country World Index (ACWI) Investable Market Index (IMI) Tobacco and Fossil Fuel Free – Net Dividends and the Bloomberg 1-5 Year Government/Credit Index.
Returns greater than 1 year are shown on an annualized basis.



Blue and Gold Endowment Pool: Assets



Blue and Gold Endowment Pool: Policy Benchmark

Asset Class	Policy Benchmark Component	Target	Min Allowable Range (%)	Max Allowable Range (%)
Public Equity	MSCI All Country World Index (ACWI) Investable Market Index (IMI) Tobacco and Fossil Fuel Free - Net Dividends	80	60	90
Fixed Income	Bloomberg 1-5 Year Government/Credit Index	20	10	40

REPORT ITEM

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

2. SUBJECT: State Budget Status Report – FY 2024-25 Preliminary Year-end

3. REPORT:

The FY 2024-25 preliminary year-end state budget status report is attached. Audited FY 2024-25 financial statements will be presented in the college-wide *Financial Statements and Independent Auditors' Report* to be prepared by the College's auditors.

Overview

FY 2024-25 preliminary year-end actuals show a break-even result from operations with a deficit of -$129,082 (-.15%). Factoring in favorable investment returns in the form of $6.1 million in unrealized gain on investments, the College ended the year with net operating income of $6 million. The results reflect favorable financial performance and the positive impact of cost restructuring as the budget approved by the Board of Directors at its September meeting carried a $2.9 million deficit.

Revenues

- **State Appropriations**, **General Fund**—General Fund support for operations in California's Budget Act 2024 is $23.2 million. As of June 30, 2025, all general funds have been claimed and posted.
- **State Appropriations, Lottery Fund**—The 2024-25 revised budget at $250,000 was established based on estimates provided by the State. Actuals at $221,469 include an estimate by the College of the third and fourth quarters' payment at $103,113.
- **Tuition and Related Fees**—Revenue projects were on target. The 2024-25 preliminary year-end actuals exceeded the revised budget by $13,833. Key highlights:
    - The HPL program revenue share exceeded expectations by $37,548 (5%).
    - The Summer Legal Institute fee exceeded expectations by $18,198 (3%).
    - JD Enrollment Fee came in just slightly below target (–$50,076 or –0.1%).

It reflects the following ending FTE enrollments:

FTE Student Enrollment	Revised Budget 2024-25	Actuals 2024-25	FTE Change	% Change
JD	1,070.9	1,069.8	(1.1)	-0.1%
LL.M.	24.7	24.7	(0.0)	0.0%
MLS/CLS	23.9	23.7	(0.2)	-0.7%
Total	**1,119.5**	**1,118.3**	**(1.2)**	**-0.1%**
Non-Resident Tuition	126.6	126.6	-	0.0%
Veteran Fee Waivers	(31.0)	(31.5)	(0.5)	1.6%

- **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). It is not a budgeted item, as there is no basis for projection. As of June 30, 2025, an unrealized gain of $6.1 million has been posted. In 2023-24, unrealized gains of $5.1 million were recognized.

Expenses

- **Salaries and Wages (including Student Wages)** —The 2024-25 preliminary year-end actuals at $31.6 million are $718,803, or 2% less than the revised budget. $526,295 of the budget variances is primarily due to position vacancies, hiring delays, or staffing turnover, mostly Human Resources, and the Advancement department. $192,508 of the variance is attributed to student employee wage, mostly under Moot Court and LRW, due to overbudgeting and fewer student hours worked.
- **Staff Benefits** – The 2024-25 actual expense at $10.6 million is preliminary; it does not yet reflect the non-cash year-end pension liability and OPEB adjusting entries. Last year's actual was $7 million after adjusting entries. The current year's actual rates at 101% of budget are aligned with the salary and wages category at 98% of budget.
- **Recruiting & Advertising**—The 2024-25 preliminary year-end actuals at $511,780 are $107,368, or 17% less than the revised budget. Most of the variances are due to reduced advertising costs within the Communication and Admissions department.
- **Insurance**—The 2024-25 preliminary year-end actuals at $874,474 are $117,259, or 12% less than the revised budget. The 2024-25 revised budget increased by 23% from 2023-24. The 2024-25 actuals are 9% higher than the insurance premiums paid in 2023-24.
- **Travel**—The 2024-25 preliminary year-end actuals at $678,873 are $295,753, or 30% less than the revised budget. One of the most significant components of the travel budget is the allocation for faculty professional development, where budget is allowed to be transferred to other expense categories. $196,888 of the variance is

attributed to 67% of the budget for faculty research accounts that had not been utilized in this category. The single largest cost center is Moot Court, with competition travel expenditures totaling $243,730. Admissions travel at $63,306 exceeded the budget allocation by 148% (budgetary savings in advertising costs helped offset some of this overrun).

- **Computer Software**—The 2024-25 preliminary year-end actuals, at $904,612, are $233,364, or 21% less than the revised budget. Most of the variance is attributed to the unspent budget from the Information Technology department, at $113,257 (preliminary year-end actual expenditure: $503,235), and the Fiscal Services department, at $69,981.
- **Building Maintenance**—Most of the building maintenance budget is allocated for janitorial services, engineering, and special repairs and maintenance. The preliminary year-end actuals at $4.5 million are $314,930, or 7% less than the revised budget. The most significant budget variances are from engineering costs at $234,388 (10%) and janitorial services costs at $35,108 (2%). The 2024-25 preliminary actuals are 7% higher than the 2023-24 year-end actuals.
- **Security Service Contract**—Year-end actuals, at $5.3 million, are $298,123, or 6% more than the revised budget (reduced by $100,000 at midyear). The $3.2 million budget for Urban Alchemy was overspent by $500,000). This was offset partially by $203,024 (or 28%) in budgetary savings from funds set aside for security services provided by the UCSF Police Department.
- **Other Contract Services** – This budget category contains various contracted services across all functions and departments of the College, and the single most significant expenditure is for hosted systems under the IT department. The preliminary year-end actuals, at $2.0 million, are $318,350, or 14%, less than the revised budget. $199,904 of the variances is attributable to contract services for approved one-time and ongoing special funding requests for IT projects that are partially spent, with some of that amount being rolled over to the 2025-26 budget.
- **Transfer to Other Funds**—$327,000 represents the return of funds transferred initially from the nonstate Dean's priority fund for sgtart-up costs for the HPL program in 2021-22 and 2022-23 not included in the budget.

Summary

UC Law broke even in 2024-25 with a small operating deficit with no funds generated for future investment. Revenues exceeded expectations, particularly due to investment gains, while expenditure was carefully controlled across most departments. Including financial aid grants, a change in net assets of $(129,082) is preliminarily reported. With an increase of $6.1 million from unrealized investment gains, the preliminary change in net assets is $6 million. Preliminary year-end actuals are subject to change.

SUMMARY - OPERATIONS	Beginning Budget 2024-25	Midyear Revised Budget 2024-25	Preliminary Year-end Actual 2024-25	Dollar Variance Preliminary Year-end Actual To Revised Budget	% Variance Preliminary Year-end Actual To Revised Budget	Year-end Actual 2023-24
Operating Revenues (without Gains/Losses)	80,602,213	81,368,446	81,422,857	54,411	0%	79,980,291
Operating Expense (without Financial Aid)	(68,422,183)	(68,278,831)	(66,683,047)	1,595,784	-2%	(61,503,584)
Operating Income (Loss)	**12,180,030**	**13,089,615**	**14,739,810**	**1,650,195**	**13%**	**18,476,707**
Financial Aid Grants	(15,070,775)	(14,909,782)	(14,868,892)	40,891	0%	(14,492,255)
Net Change includes Financial Aid	**(2,890,745)**	**(1,820,167)**	**(129,082)**	**1,691,086**	**-93%**	**3,984,452**
Realized/Unrealized Gains (Losses)	-	-	6,147,789	6,147,789	-	5,076,627
Change in Net Assets	**(2,890,745)**	**(1,820,167)**	**6,018,707**	7,838,874	**-431%**	**9,061,079**
Beginning Net Assets - Operating	32,282,983	32,282,983	32,282,983	0	0%	25,899,200
Ending Net Assets - Operating	**$ 29,392,237**	**$ 30,462,815**	**$ 38,301,690** *	**7,838,874**	**26%**	**$ 34,960,279**

After recognizing that a portion of reserves results from state funding for specific purposes, the unallocated ending operating reserves are $37.8 million.

Ending Reserves (Preliminary)	**$ 38,301,690**
Less Carryforwards:	
•	
• Bench to School Program	(533,681)
Adjusted Balance	**$37,768,009**

Plant Fund Reserve

The State Plant Fund Reserve ended 2023-24 with a net asset balance of $6.2 million. With an increase of $1.3 million from investment activities, the 2024-25 preliminary year-end reserve is $7.4 million.

Lease-Revenue Bond Rental Payments

The State Budget Act of 2024 includes $3,092,000 in General Fund capital item 6600-003-0001 for support of UC Law SF. This is the scheduled rental payment for the 333 Golden Gate building, funded by lease-revenue bonds through the State of California, a pass-through transaction with no net cash flow impact on the College. The State Public Works Board withdraws through the State Controller's Office.

California Scholars

A total of $9 million in funding 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. The 2024-25 student scholarship awards totaled $555,064 with an ending fund balance of $5.8 million.

Attachment: State Budget Status Report – Preliminary 2024-25 Year-end

UC LAW SAN FRANCISCO
State Budget Status Report - Preliminary 2024-25 Year-end

REVENUES	Beginning Budget 2024-25	Midyear Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Dollar Variance Preliminary Year-end Actual To Revised Budget	% Variance Preliminary Year-end Actual To Revised Budget	Year-end Actual 2023-24
State Appropriations							
General Fund	23,181,000	23,181,000	23,181,000	*	-	0%	23,956,000
Lottery Fund	233,000	250,000	221,469	*	(28,531)	-11%	256,987
Subtotal	**$ 23,414,000**	**$ 23,431,000**	**$ 23,402,469**		**$ (28,531)**	**0%**	**$ 24,212,987**
Tuition and Related Fees							
JD Enrollment Fee	52,543,512	52,882,024	52,831,948		(50,076)	-0.1%	51,454,587
Non-Resident Tuition	816,192	947,786	947,786		-	0%	767,382
Veteran Fee Waivers	(1,629,639)	(1,530,873)	(1,556,041)		(25,168)	2%	(1,529,569)
LL.M. Tuition	1,282,500	1,174,466	1,174,466		(0)	0%	1,198,408
MLS and CLS Tuition	487,500	777,156	771,648		(5,509)	-1%	503,750
HPL Revenue Share	697,124	697,124	734,672		37,548	5%	646,314
Summer Legal Institute	667,420	667,420	685,618		18,198	3%	631,355
MBE Support Fee	137,640	134,520	134,880		360	0%	139,560
Other Student Fees	153,059	113,206	151,686		38,480	34%	180,300
Subtotal	**$ 55,155,308**	**$ 55,862,829**	**$ 55,876,662**	*	**$ 13,833**	**0%**	**$ 53,992,088**
Scholarly Publications							
Subscription Revenues	33,922	33,922	28,925		(4,997)	-15%	38,130
Subtotal	**$ 33,922**	**$ 33,922**	**$ 28,925**		**$ (4,997)**	**-15%**	**$ 38,130**
Other Income							
Investment Income	600,000	600,000	609,015		9,015	2%	672,737
Realized Gain/Loss on Sale of Investments	-	-	3,469		3,469	-	-
Unrealized Gain/Loss on Investments	-	-	6,144,320	*	6,144,320	-	5,076,627
Overhead Allowances	938,008	979,720	1,012,257		32,537	3%	880,534
Miscellaneous Income	174,975	174,975	207,542		32,567	19%	116,775
Subtotal	**$ 1,712,983**	**$ 1,754,695**	**$ 7,976,603**		**$ 6,221,908**	**355%**	**$ 6,746,673**
Transfer from Other Funds	**$ 286,000**	**$ 286,000**	**$ 285,986**		**$ (14)**	**0%**	**$ 67,040**
TOTAL REVENUES	**$ 80,602,213**	**$ 81,368,446**	**$ 87,570,645**		**$ 6,202,199**	**7.6%**	**$ 85,056,918**

*See attached narrative report

UC LAW SAN FRANCISCO
State Budget Status Report - Preliminary 2024-25 Year-end

EXPENSES	Beginning Budget 2024-25	Midyear Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Dollar Variance Preliminary Year-end Actual To Revised Budget	% Variance Preliminary Year-end Actual To Revised Budget	Year-end Actual 2023-24
Salaries & Wages	31,881,945	31,469,992	30,943,697	*	(526,295)	-2%	29,554,372
Student Wages-Reg. & Work-study	911,237	815,139	622,631	*	(192,508)	-24%	710,340
Staff Benefits	10,503,634	10,442,164	10,568,576		126,412	1%	6,986,748
Consultants	674,477	638,029	613,978		(24,051)	-4%	594,309
Employee Development & Testing	168,467	156,841	127,675		(29,166)	-19%	152,096
Recruiting & Advertising	532,278	619,148	511,780	*	(107,368)	-17%	368,634
Audit, Legal, and Case Costs	305,483	328,773	357,799		29,026	9%	292,437
Insurance	989,515	991,733	874,474	*	(117,259)	-12%	803,331
Printing & Copier Service	326,904	299,119	274,322		(24,797)	-8%	272,671
Supplies	356,088	365,795	370,420		4,625	1%	387,223
Travel	942,979	974,626	678,873	*	(295,753)	-30%	753,134
Memberships & Subscriptions	381,163	370,058	369,554		(504)	0%	331,384
Events & Entertainment	704,695	692,195	685,025		(7,170)	-1%	641,340
Computer Software	1,136,945	1,137,976	904,612	*	(233,364)	-21%	955,528
Data Processing	445,375	444,775	466,071		21,296	5%	425,123
Electronic Databases & Bibliography Svs	551,902	565,251	562,751		(2,500)	0%	554,803
Books & Bindings	612,923	599,494	584,358		(15,136)	-3%	602,785
Equipment Maintenance	213,154	206,154	192,567		(13,587)	-7%	149,815
Building Maintenance	4,855,305	4,803,305	4,488,375	*	(314,930)	-7%	4,207,395
Security Service Contract	5,110,000	5,010,000	5,308,123	*	298,123	6%	4,375,587
Other Contract Services	1,987,093	2,302,730	1,984,380	*	(318,350)	-14%	2,034,523
Utilities	1,259,417	1,259,417	1,158,312		(101,105)	-8%	1,209,912
Equipment & Improvements	290,779	226,391	169,739		(56,652)	-25%	383,768
Space & Equipment Rental	3,087,412	3,327,526	3,262,743		(64,783)	-2%	3,091,705
Miscellaneous Expense	193,013	232,200	275,177		42,977	19%	393,811
Financial Aid Grants	15,070,775	14,909,782	14,868,892		(40,891)	0%	14,492,255
Transfer to Other Funds	0	0	327,036	*	327,036	-	1,270,812
TOTAL EXPENSES	**$ 83,492,958**	**$ 83,188,613**	**$ 81,551,938**		**$ (1,636,675)**	**-2.0%**	**$ 75,995,839**

*See attached narrative report

UC LAW SAN FRANCISCO
State Budget Status Report - Preliminary 2024-25 Year-end

SUMMARY - OPERATIONS	Beginning Budget 2024-25	Midyear Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Dollar Variance Preliminary Year-end Actual To Revised Budget	% Variance Preliminary Year-end Actual To Revised Budget	Year-end Actual 2023-24
Operating Revenues (without Gains/Losses)	80,602,213	81,368,446	81,422,857		54,411	0%	79,980,291
Operating Expense (without Financial Aid)	(68,422,183)	(68,278,831)	(66,683,047)		1,595,784	-2%	(61,503,584)
Operating Income (Loss)	**$ 12,180,030**	**$ 13,089,615**	**$ 14,739,810**		**$ 1,650,195**	**13%**	**$ 18,476,707**
Financial Aid Grants	(15,070,775)	(14,909,782)	(14,868,892)		40,891	0%	(14,492,255)
Net Change includes Financial Aid	**$ (2,890,745)**	**$ (1,820,167)**	**$ (129,082)**		**$ 1,691,086**	**-93%**	**$ 3,984,452**
Realized/Unrealized Gains (Losses)	-	-	6,147,789		6,147,789	-	5,076,627
Change in Net Assets	**$ (2,890,745)**	**$ (1,820,167)**	**$ 6,018,707**		**$ 7,838,874**	**-431%**	**$ 9,061,079**
Beginning Net Assets - Operating	32,282,983	32,282,983	32,282,983		0	0%	25,899,200
Ending Net Assets - Operating	**$ 29,392,237**	**$ 30,462,815**	**$ 38,301,690**	*	**$ 7,838,874**	**26%**	**$ 34,960,279**

*See attached narrative report

REPORT ITEM

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

2. SUBJECT: Non-State Budget Report– Preliminary 2024-25 Year-end

3. REPORT:

Attached is the non-state budget status report for the preliminary year-end of FY 2024-25. Audited 2024-25 data will be presented in the *Financial Statements and Independent Auditors' Report* to be prepared by the College's auditors.

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

- Restricted Funds
- Unrestricted Funds

RESTRICTED FUNDS

This report includes all non-state current-use funds with restrictions imposed by external sources, such as donors or granting agencies. We are expending accumulated current-use fund balances from gifts and grants per fund restrictions. Any unspent fund balances will carry over to the following fiscal year.

Overview

The preliminary year-end results for FY 2024-25 show a net positive change in net assets of $0.7 million, compared to the beginning budget's projected decrease of $4.2 million. The improved outcome is primarily attributable to higher-than-expected operating revenues of $7.7 million, representing a 29% increase, lower overall operating expenses of $11.3 million, representing an 11% decrease, and significant increases in net non-operating revenues at $4.3 million, representing a 70% increase. Significant variances in revenues and expenses are noted below.

Operating Revenues

Operating revenues exceeded the budget by 29% ($7.7 million actual vs. $6 million budget).

- **Grants and Contracts**—The 2024-25 preliminary year-end actuals are at $7.6 million, $1.7 million or 28% above budget. Growth was driven by several significant awards received after the budget was set, including $593,910 federal grants and contracts, as well as a $501,971 SF City and County grants to CGRS. Grants and

contracts for 2023-24 totaled $6 million. The following grants and contracts were received in 2024-25:

- $1.6 million in federal grants and contracts
- $163,364 in state grants and contracts
- $2.5 million in private non-exchange grants
- $2.7 million in private exchange grants and contracts
- $680,567 in City and County of San Francisco grants

- **Other Income** –2024-25 preliminary actual of $83,145, vastly exceeding the $1,500 budget, primarily due to unbudgeted event income generated by the Center for Business Law and conference fees generated by the UC Law Journal. The $0.96 million drop from 2023-24 actuals is mainly due to the $0.97 million one-time other revenue from partners to the California Institute on Law, Neuroscience, and Education (CILNE).

Operating Expenses

Total operating expenses were $1.4 million under budget (11% savings), though results varied across categories:

- **Instruction and Research-Salaries and Benefits**—2024-25 preliminary year-end actuals at $6.8 million, $369,801 or 6% over budget, driven by staffing and benefit costs for grant-funded programs in research centers (notably C4i and CGRS). The significant variances are from the Center for Negotiation and Dispute Resolution program salaries, wages, and benefits costs, at $149,685, which were funded by state contract after the initial budgets were established. The combined benefit rates for 2024-25 remained unchanged from 2023-24.
- **Instruction and Research-Program Support**—The 2024-25 preliminary year-end actuals are at $1.8 million, $308,797 or 14% under budget, due to delayed or deferred spending in specific grant programs (e.g., Cy Pres Blue Shield grant). $375,000 of the variance is from the Cy Pres Blue Shield grant, with no actual expenses posted for events and awards.
- **Public and Professional Services-Salaries and Benefits**—The 2024-25 preliminary year-end actuals at $303,383 are $154,943, or 34% less than the beginning budget, mainly due to lower staffing and reduced project activity. $129,314 of the variance is due to low spending on temporary help wages and benefits under the Grove Foundation Gift program.
- **Financial Aid-Salaries and Benefits**—The 2024-25 preliminary year-end actuals at $120,467 are $112,967 more than the beginning budget, mainly due to the federal campus work study program, whose wages were not included in the beginning budget.
- **Financial Aid-Scholarships and Fellowships**—The 2024-25 preliminary year-end actuals disbursement at $1.9 million are $1.4 million less than the beginning budget,

with the difference carried forward for future awards. This year's 2024-25 awards are $92,746 or 5% less than the 2023-24 disbursement. Budgetary carryover exists because we budget up to the available cash balance for each scholarship program and any unused funds will be carried over to the following year for disbursement. $260,807 of the variances are from budgeted scholarships with no actual awards (e.g., Startup Legal Garage $110,210, Catherwood $123,064). $342,677 of the variances are from the first-year section and California Bar Prep scholarships, with low actual awards at $42,303.

- **Student Organizations**—The various student organizations carry cash balances with the College and are not required to submit budgets. In 2024-25, program support incurred $139,089 in expenses on behalf of student organizations, with most of the costs allocated to events and awards.

Nonoperating Revenues/(Expenses)

Nonoperating activity contributed heavily to the positive variance:

- **Donations**—The 2024-25 gifts received for current use exceeded projections by $1.4 million and totaled $2.1 million net of gift processing fees (6%), boosted by large one-time gifts not anticipated in the budget cycle. $1.3 million was received in gifts in 2024-25 and was not included in the beginning budget, which includes a $0.5 million donation for theDeb Artificial Intelligence Fund, and over $197,000 from four Cy Pres awards The 2024-25 budget for donations reflected projected gifts available for current use from reliable or known sources (e.g., Blum Foundation, CGRS Support) and was adjusted downward from 2023-24 actuals to account for one-time contributions.
- **Net Endowment Payout**—This category includes payouts from endowments held by the College and payouts from funds held by UC on our behalf. The 2024-25 actual is $1.8 million, up 10% from $1.6 million in 2023-24, with the payout rate unchanged.
- **Unrealized Gain/Loss on Investments**—In 2024-25, the nonstate restricted fund's share (e.g., CGRS reserves) of the change in market value of UC-GEP investments was an unrealized gain of $224,896. In 2023-24, an unrealized gain of $194,211 was recognized. Market gains or losses on investments are not a budget item, given their volatility and lack of basis for projection.
- **Net Transfer to/from Other Funds**—A positive number in this category is an addition (transfer from/revenue), while a negative number is a deduction (transfer to/expense). The 2024-25 preliminary actuals are at $147,636, 186% of the budget, reflecting additional institutional support transfers. It includes a $100,000 transfer from the unrestricted funds of CNDR to augment their restricted Mediation, Negotiation, and Trauma program funded by state contract.

UNRESTRICTED FUNDS

This report includes all non-state current-use funds that are not subject to restrictions imposed by external sources. These funds include gifts given without restriction, such as the UC Law SF Foundation's block grants to support Institutional Advancement and Alumni Office functions. Additionally, funds generated to support the budgets of individual programs, such as membership programs and conferences, are also recorded here. Miscellaneous revenue sources include student application fees (currently from non-JD programs), room rentals, and vending machine commissions, which fund programs that may not have their own income, such as academic conferences, student and College-wide events, and administrative support funds. We report Auxiliary Enterprises budget status as a separate agenda item, so they are not included in this unrestricted fund report. . Designated Funds, those funds restricted as to use by the Board of Directors (e.g., Digardi Professorship, UC Law Chair, PICAP), are also categorized as unrestricted current-use funds because it is within the Board's power to remove such restrictions, and related activity is included in this report.

Overview

The FY 2024-25 preliminary year-end results for unrestricted non-state funds show a net decrease in net assets of $0.8 million, which is $1.4 million better than the budgeted deficit of $2.2 million. The improved position is primarily due to stronger-than-expected nonoperating revenues, especially donations, endowment payout, and investment gains, which offset certain operating expense overages.

Operating Revenues

Total operating revenues of $1.2 million were 4% above budget.

- **Dues/Memberships**—The 2024-25 preliminary year-end actual reached $145,000, exceeding budget by $29,000 or 25%, primarily due to higher-than-anticipated membership revenue from the Equality Action Center. $150,000 in revenues were posted in 2023-24.
- **Other Income**—The 2024-25 preliminary year-end actual was $531,327, 13% above budget, driven by higher service revenues and miscellaneous income sources. This increase was primarily from deposits forfeited and Work Life Law services. Other unrestricted revenues include rental and alumni event income.

Operating Expenses

Total operating expenses of $6.5 million were 2% above budget, with significant category variances listed below.

- **Instruction and Research-Program Support**—The 2024-25 preliminary year-end actuals at $289,314 were substantially under budget (56%), reflecting deferred or

reduced project spending. $137,561 of the variances are due to unspent budget allocated to contract costs under the Center for Work-Life Law. The 2024-25 actual expenditure has decreased by $123,518, or 30%, compared to the 2023-24 actual expenditure.

- **Institutional and Building Support-Salaries and Benefits**—The 2024-25 preliminary year-end actuals at $1.2 million were $319,473 or 38% over budget primarily due to the Advancement department's staff funding change from state to non-state funds, as part of the budget restructuring plan implemented after the beginning budget was established. The combined benefit rates for 2024-25 remained unchanged from 2023-24.
- **Institutional and Building Support-Program Support**—The 2024-25 preliminary year-end actuals at $2.2 million were $531,792, or 33% more than the beginning budget, primarily due to the $808,669 spending funded by the Digardi Hall account for Academic Village development efforts not included in the beginning budget.
- **Financial Aid-Scholarships and Fellowships**— The 2024-25 preliminary year-end actuals at $1.1 million were $424,777 or 27% less than the beginning budget, reflecting lower award disbursements. $255,192 of the variance is from the Specter Discretionary Scholarship fund, and $181,984 of the variance is from the Harry & Lillian UC Law Scholarship fund. The remaining funds will be carried to the following fiscal year for award.

Nonoperating Revenues / (Expenses)

Nonoperating activity totaled $4.5 million, $1.5 million or 48% above budget, and was the primary driver of the improved financial outcome:

- **Foundation Grants and Other Donations**—The 2024-25 preliminary year-end actuals totaled $2.8 million, $525,423 or 23% over budget, due to significant one-time gifts not anticipated in the initial plan. It includes a $94,000 donation (after a 6% gift processing fee) for the use of the new Center for Constitutional Democracy, with no allocated budget. The gift processing fee revenue is $225,805 more than the budget. The Walkup Melodia Discretionary fund received $200,000 more in donations than budgeted, for a total of $800,000. The College budget reflects the Foundation's plan to fund a block grant of $810,000, of which $605,000 was posted by the end of the year; unrestricted gifts to the Foundation fell short of budget.
- **Net Endowment Payout**—The 2024-25 preliminary year-end actuals were $505,082, 55% above budget, primarily due to the $180,049 net endowment payout to the Digardi Hall program, which was not included in the beginning budget. The 2024-25 total actual net endowment payout received for all unrestricted funds was $212,385, more than the 2023-24 actuals.
- **Unrealized Gain/Loss on Investments**—In 2024-25, the nonstate unrestricted fund's share of the change in the market value of UC-GEP investments was unrealized gains

of $1.6 million, including $1.2 million credited to the state plant fund reserve. In 2023-24, unrealized gains of $1.2 million were recognized. Market gain or loss on an investment is not a budget item, given its volatility and the lack of a basis for projection.

- **Net Transfers to/from Other Funds**—A positive number in this category is an addition (transfer from/revenue), while a negative number is a deduction (transfer to/expense). The 2024-25 net transfers were $(754,547), which was a negative variance of $(804,053) compared to the budget, reflecting a significant transfer out rather than the planned transfer in. This is primarily due to the $936,716 transfer out to the non-state Auxiliary Tower program, which was not included in the initial budget. Offsetting this expense is an unbudgeted revenue transfer of $347,000, representing repayment from state funds to the Dean's Priorities Funds for monies advanced in prior years.

Attachments:

Non-State Budget Status Report – 2024-25 Preliminary Year-end

UC LAW SAN FRANCISCO 09/12/25

Non-State Budget Status Report - 2024-25 Preliminary Year-end
Restricted Funds

	Beginning Budget 2024-25	Preliminary Year-end Actual 2024-25		Preliminary Year-end Actual as Percent of Beginning Budget 2024-25	Year-end Actual 2023-24
REVENUES					
Grants and Contracts	5,954,464	7,627,189	*	128%	6,032,940
Other Income	1,500	83,145	*	5543%	1,041,791
TOTAL OPERATING REVENUES	**$ 5,955,964**	**$ 7,710,334**		**129%**	**$ 7,074,731**
EXPENSES					
Instruction and Research					
Salaries and Benefits	6,404,990	6,774,792	*	106%	5,915,612
Program Support	2,140,476	1,831,679	*	86%	1,729,202
Public and Professional Services					
Salaries and Benefits	458,326	303,383	*	66%	352,693
Program Support	140,153	90,632		65%	107,639
Academic Support					
Salaries and Benefits	-	-		-	-
Program Support	-	-		-	-
Student Services					
Salaries and Benefits	-	-		-	4,412
Program Support	97,699	11,194		11%	13,428
Institutional and Building Support					
Salaries and Benefits	34,976	34,238		98%	36,692
Program Support	150,518	109,650		73%	180,462
Financial Aid					
Salaries and Benefits	7,500	120,467	*	1606%	10,000
Program Support	17,838	3,927		22%	1,686
Administrative Overhead	-	-			-
Scholarships and Fellowships	3,287,631	1,914,051	*	58%	2,006,797
Student Organizations					
Program Support	-	139,089	*	-	113,471
TOTAL OPERATING EXPENSES	**$ 12,740,108**	**$ 11,333,100**		**89%**	**$ 10,472,092**
NET OPERATIONS	**$ (6,784,144)**	**$ (3,622,766)**		**53%**	**$ (3,397,361)**
NONOPERATING REVENUES (EXPENSES)					
Donations	759,744	2,146,149	*	282%	2,046,707
Investment Income	-	25,854		-	28,003
Net Endowment Payout	1,711,172	1,786,722	*	104%	1,618,656
Realized Gain/Loss on Sale of Investments	-	(211)		-	917
Unrealized Gain/Loss on Investments	-	224,896	*	-	194,211
Net Transfers to/from Other Funds	79,250	147,636	*	186%	516,851
TOTAL NONOPERATING REVENUES (EXPENSES)	**$ 2,550,166**	**$ 4,331,046**		**170%**	**$ 4,405,347**
TOTAL CHANGE IN NET ASSETS	**$ (4,233,978)**	**$ 708,280**		**-17%**	**$ 1,007,986**

*See attached narrative.

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Non-State Budget Status Report - 2024-25 Preliminary Year-end
Unrestricted Funds

	Beginning Budget 2024-25	Preliminary Year-end Actual 2024-25		Preliminary Year-end Actual as Percent of Beginning Budget 2024-25	Year-end Actual 2023-24
REVENUES					
Dues/Memberships	116,000	145,000	*	125%	150,000
Fees	444,112	456,723		103%	317,647
Private Grants and Contracts	10,900	4,553		42%	2,111
Other Income	469,931	531,327	*	113%	338,698
Overhead Allowances	72,921	22,417		31%	30,386
TOTAL OPERATING REVENUES	**$ 1,113,864**	**$ 1,160,020**		**104%**	**$ 838,842**
EXPENSES					
Instruction and Research					
Salaries and Benefits	924,544	954,046		103%	1,136,545
Program Support	654,484	289,314	*	44%	412,832
Public and Professional Services					
Salaries and Benefits	41,698	53,573		128%	33,372
Program Support	48,126	30,654		64%	12,884
Academic Support					
Salaries and Benefits	-	15,000		-	-
Program Support	47,100	34,261		73%	24,340
Student Services					
Salaries and Benefits	8,444	57,936		686%	52,807
Program Support	629,711	623,303		99%	377,647
Institutional and Building Support					
Salaries and Benefits	851,843	1,171,316	*	138%	820,501
Program Support	1,618,447	2,150,239	*	133%	1,120,268
Financial Aid					
Scholarships and Fellowships	1,555,310	1,130,533	*	73%	947,168
Program Support	-	-		-	-
TOTAL OPERATING EXPENSES	**$ 6,379,708**	**$ 6,510,175**		**102%**	**$ 4,938,363**
NET OPERATIONS	**$ (5,265,844)**	**$ (5,350,155)**		**102%**	**$ (4,099,521)**
NONOPERATING REVENUES (EXPENSES)					
Foundation Grants and Other Donations	2,276,324	2,801,747	*	123%	2,840,120
Investment Income	145,963	153,244		105%	165,866
Net Endowment Payout	325,030	505,082	*	155%	292,696
Endowment Management Fee Revenue	269,949	269,949		100%	244,033
Realized Gain/Loss on Sale of Investments	-	819		-	386
Unrealized Gain/Loss on Investments	-	1,573,001	*	-	1,158,447
Net Transfers to/from Other Funds	49,506	(754,547)	*	-1524%	261,659
TOTAL NONOPERATING REVENUES (EXPENSES)	**$ 3,066,772**	**$ 4,549,295**		**148%**	**$ 4,963,209**
TOTAL CHANGE IN NET ASSETS	**$ (2,199,071)**	**$ (800,860)**		**36%**	**$ 863,687**

*See attached narrative.

REPORT ITEM

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

2. SUBJECT: Auxiliary Enterprises Budget Report - Preliminary 2024-25 Year-end

3. REPORT:

The preliminary 2024-25 year-end budget status reports for Auxiliary Enterprises, including McAllister Tower, Parking Garage, Student Health Services, and Special Events and Guest Services, are attached. Significant variances are outlined below.

Overview

The preliminary 2024-25 year-end actual results for Auxiliary Enterprises reflect total operating revenues of $3.96 million, or 91% of the 2024-25 revised budget of $4.33 million. Across all auxiliaries, results are generally in line with budget expectations in core revenue categories. Total operating expenses were $2.51 million, representing 97% of the revised expense budget of $2.58 million. The resulting net operating income of approximately $1.46 million is 17% below the revised budget of $1.76 million, primarily driven by lower-than-expected net adjusted retail lease revenue in the Parking Garage due to lease modification losses required by GASB, and lower room rental activity in Special Events and Guest Services. Non-operating revenues and expenses, including investment income, unrealized gains, and net transfers, contributed to a $1.3 million change in net assets**.** Offset by debt service expenses on the Parking Garage bond and other miscellaneous costs, the preliminary net nonoperating income is $32,953. The preliminary 2024-25 change in net assets for all Auxiliary Enterprises is $1.49 million.

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

- **Overhead Pro Rata** – All auxiliary enterprises are assessed administrative overhead expenses to reflect indirect costs. The rate is set at 5% of the total operating revenues for each auxiliary enterprise. At the end of the 2024-25 fiscal year, the total overhead expenses for all auxiliary enterprises were $211,117, which represents 97% of the revised budget.
- **Unrealized Gain/Loss on Investments** – This category accounts for the change in the market value of the UC General Endowment Pool (GEP). It is not a budgeted item, given the security market's volatility and lack of basis for projection. Unrealized gains of $694,698 ($666,664 for McAllister Tower and $28,034 for Student Health Services) have been recognized as of June 30, 2025. In 2023-24, unrealized gains of $575,703 were reported for all auxiliary enterprises.

MCALLISTER TOWER

- **Operating Revenues** – There are no operating revenues recorded in 2024-25 due to the Tower's vacancy and ongoing renovation since December 2023.
- **Operating Expenses** – The 2024-25 preliminary year-end total of $93,918 (93% of revised budget) reflects insurance premiums and minimal other costs during vacancy. It includes a $(6,790) bad debt adjustment to clear prior years' excess allowance.
- **Transfer from Other Funds** – $936,716 was transferred from the Annual Fund & Unrestricted Giving program as a reserve for the Tower Renovation project and, if needed, to augment the Academe at 198 to meet the debt service requirements.

PARKING GARAGE

- **Parking Operations** – The 2024-25 preliminary year-end actual was $2.59 million, 99% of the revised budget. Transient parking fell below expectations at $78,178 (-5%) due to the December closure and weaker year-end activity; however, monthly, student, and especially fleet parking all exceeded their targets.
- **Retail Leases** – The 2024-25 preliminary year-end actual was $48,294, 21% of the revised budget, primarily due to $255,899 GASB 87 lease modification loss adjustments to the balance sheet that reduce the earned retail lease revenue of $304,193. Modifications to leases this year result in losses, posted under GASB guidelines, that represents future revenue previously expected to be incurred: Golden Era $146,408, Philz Coffee $97,708 and Subway $11,783. This highlights the financial implications of lease changes. Excluding this adjustment, revenue would have been $304,193; this is $76,193, or 33% more than the revised budget.
- **Operating Expenses** – The 2024-25 preliminary year-end actual was $1.11 million, 98% of the revised budget. Personnel costs are closely aligned with the revised budget at 96%. Maintenance and special repairs totaled $216,080, including a one-time $151,793 garage ramp resurfacing project completed in December 2024. Insurance expense of $129,085 was recognized in full. Engineering contract services, budgeted at $5,000, have not been utilized.
- **Investment Income** – One effect of implementing the accounting standard GASB Statement 87 "Leases" is the recognition of investment income; this non-cash entry is not a budgeted event. As of the end of June 2025, $40,864 has been recognized.
- **Capital Asset Additions/Deductions (GASB 87)** – These two report lines are from entries required by lease accounting standard GASB Statement 87 "Leases"; the net is a non-cash change of $199,329 to the bottom line as of the end of June 2025.

STUDENT HEALTH SERVICES

- **Fees** – The 2024-25 preliminary year-end actual was $1.14 million, essentially meeting the revised budget, with 1,138 FTE students paying the $965 Health Center Fee and 462 FTE students paying the $100 GSHIP Administration Fee.
- **Operating Expenses** – The 2024-25 preliminary year-end actual was $1.09 million, 100% of the revised budget. Personnel costs are closely aligned with the revised budget at 99%. Contracted temporary help costs were $22,851, exceeding the $12,000 budget to cover the temporary vacancy of the Health & Wellness Coordinator position. Consultant and contracted services with Carbon Health totaled $837,694, which is slightly higher than the revised budget by 1%.

SPECIAL EVENTS AND GUEST SERVICES

- **Room Rental –** The 2024-25 preliminary year-end actual was $540,734, 84% of the revised budget of $643,494. It includes the classroom and space rental contracts with UC Davis Graduate School of Management, space rental at the 333 Golden Gate Sky Deck and Colloquium Room, and the Alumni Reception Center and Dining Commons in Kane Hall. $235,672 room rental revenues received in 2024-25 have been deferred to the 2025-26 fiscal year; the midyear revised budget did not account for future year rental periods when current rental agreements were reviewed.**Staff Salaries, Wages, and Benefits –** The 2024-25 preliminary year-end actual was $132,435, 76% of the revised budget. This is primarily because $20,000 of the budget allocated for temporary help wages and $10,000 of the budget allocated for student employee wages were not spent. The budget for regular staff salaries is aligned with the revised budget at 100%.
- **Other Contract Services –** The budget for external contract services has been reduced to $5,000 at mid-year, and no spending has been incurred by the end of June 2025. This category also includes the Security Services budget at $2,500, of which $2,337 has been spent by the end of June 2025.
- **Investment Income** – An effect of the GASB 87 lease accounting standard is the recognition of investment income. The midyear revised budget was adjusted to $3,700. As of June 2025, the UC investment pool's earned income attributed to Special Events and Guest Services is $9,772. The budget variance is explained by the inclusion of GASB entries in the actual amount of $17,745.
- **Nonmandatory Transfers to/from Other Funds** – The net cash generated from Special Events and Guest Services is transferred to the unrestricted nonstate college-wide support fund, to support programmatic expenses that have no operating revenues of their own. $525,610 has been transferred at the end of fiscal year 2024-25, this is $116,960 more than the budgeted projection of $408,650..

Summary

While total auxiliary revenues fell slightly short of projections due to one-time lease losses and weaker transient parking activity, core operations remain financially stable. Net operating results from McAllister Tower and Student Health Services tracked closely to revised budget, while Parking Garage variances are primarily caused by losses from modified retail leases. Special Events and Guest Services had lower than expected net operating results; however, with higher than budgeted investment income and recognition of prior year carryover this funding source transferred $525,610 cash to the College ($116,960 more than budgeted). The 2024-25 preliminary year-end change in net assets is $1.49 million compared to the revised budget at $0.9 million.

	McAllister Tower		Parking Garage		Student Health Services		Special Events and Guest Services				
	2024-25 Revised Budget	Preliminary Year-end Actual 2024-25	2024-25 Revised Budget	Preliminary Year-end Actual 2024-25	2024-25 Revised Budget	Preliminary Year-end Actual 2024-25	2024-25 Revised Budget	Preliminary Year-end Actual 2024-25	Total 2024-25 Revised Budget	Total Preliminary Year-end Actual 2024-25	Total Preliminary Actual as a Percent of Revised Budget
Operating Revenues	-	(4,000)	2,545,250	2,282,710	1,144,932	1,144,891	643,494	540,734	4,333,676	3,964,335	91%
Operating Expenses*	100,708	93,918	1,138,603	1,114,605	1,086,846	1,091,676	250,844	205,549	2,577,001	2,505,748	97%
Net Operations	**$ (100,708)**	**$ (97,918)**	**$ 1,406,647**	**$ 1,168,105**	**$ 58,086**	**$ 53,215**	**$ 392,650**	**$ 335,185**	**$ 1,756,675**	**$ 1,458,587**	**83%**
Nonoperating Revenues/(Expenses)											
Investment Income	80,000	64,471	-	40,864	13,000	19,950	3,700	27,517	96,700	152,802	158%
Unrealized & Realized Investment Gain/Loss	-	667,025	-	-	-	28,049	-	-	-	695,074	-
Funded from Bond Proceeds	-	-	13,936	13,937	-	-	-	-	13,936	13,937	100%
Debt Service	-	-	(1,491,936)	(1,482,123)	-	-	-	-	(1,491,936)	(1,482,123)	99%
Capital Asset Additions (GASB 87)	-	-	-	914,614	-	-	-	244,805	-	1,159,419	-
Capital Asset Deductions (GASB 87)	-	-	-	(715,285)	-	-	-	(244,961)	-	(960,246)	-
Cash Short/Over	-	-	-	(1,404)	-	-	-	-	-	(1,404)	-
Transfer to/from Other Funds**	936,716	936,716	-	44,389	-	-	(408,650)	(525,610)	528,066	455,494	86%
Net Nonoperations	**$1,016,716**	**$ 1,668,212**	**$(1,478,000)**	**$ (1,185,008)**	**$ 13,000**	**$ 47,999**	**$(404,950)**	**$ (498,250)**	**$ (853,234)**	**32,953**	**-4%**
TOTAL CHANGE IN NET ASSETS	**$ 916,008**	**$ 1,570,294**	**$ (71,353)**	**$ (16,903)**	**$ 71,086**	**$ 101,214**	**$ (12,300)**	**$ (163,065)**	**$ 903,441**	**$ 1,491,540**	**165%**

*The 2024-25 preliminary actual operating expenses include $211,117 in administrative overhead assessments charged as 5% of operating revenues. Absent these indirect costs, the preliminary change in net assets of all Auxiliary Enterprises is $1.7 million.

**$936,716 was transferred in as a reserve from the Annual Fund & Unrestricted Giving program for the Tower Renovation project and to support Academe at 198 for debt service needs.

**$525,610 is the cash transfer out from Special Events & Guest Services to the non-state college-wide support fund. Excluding these transfers and the administrative overhead assessments, the 2024-25 preliminary change in net assets of all Auxiliary Enterprises is $1.29 million.

Attachment:

- Auxiliary Enterprises Budget Report - Preliminary 2024-25 Year-end

Auxiliary Enterprises Summary
Budget Status Report - Preliminary 2024-25 Year-end

	McAllister Tower		Parking Garage		Student Health Services		Special Events and Guest Services				
	2024-25 Revised Budget	Preliminary Year-end Actual 2024-25	2024-25 Revised Budget	Preliminary Year-end Actual 2024-25	2024-25 Revised Budget	Preliminary Year-end Actual 2024-25	2024-25 Revised Budget	Preliminary Year-end Actual 2024-25	Total 2024-25 Revised Budget	Total Preliminary Year-end Actual 2024-25	Total Preliminary Actual as a Percent of Revised Budget
Operating Revenues	-	(4,000)	2,545,250	2,282,710	1,144,932	1,144,891	643,494	540,734	4,333,676	3,964,335	91%
Operating Expenses*	100,708	93,918	1,138,603	1,114,605	1,086,846	1,091,676	250,844	205,549	2,577,001	2,505,748	97%
Net Operations	**$ (100,708)**	**$ (97,918)**	**$ 1,406,647**	**$ 1,168,105**	**$ 58,086**	**$ 53,215**	**$ 392,650**	**$ 335,185**	**$ 1,756,675**	**$ 1,458,587**	**83%**
Nonoperating Revenues/(Expenses)											
Investment Income	80,000	64,471	-	40,864	13,000	19,950	3,700	27,517	96,700	152,802	158%
Unrealized & Realized Investment Gain/Loss	-	667,025	-	-	-	28,049	-	-	-	695,074	-
Funded from Bond Proceeds	-	-	13,936	13,937	-	-	-	-	13,936	13,937	100%
Debt Service	-	-	(1,491,936)	(1,482,123)	-	-	-	-	(1,491,936)	(1,482,123)	99%
Capital Asset Additions (GASB 87)	-	-	-	914,614	-	-	-	244,805	-	1,159,419	-
Capital Asset Deductions (GASB 87)	-	-	-	(715,285)	-	-	-	(244,961)	-	(960,246)	-
Cash Short/Over	-	-	-	(1,404)	-	-	-	-	-	(1,404)	-
Transfer to/from Other Funds**	936,716	936,716	-	44,389	-	-	(408,650)	(525,610)	528,066	455,494	86%
Net Nonoperations	**$ 1,016,716**	**$ 1,668,212**	**$ (1,478,000)**	**$ (1,185,008)**	**$ 13,000**	**$ 47,999**	**$ (404,950)**	**$ (498,250)**	**$ (853,234)**	**32,953**	**-4%**
TOTAL CHANGE IN NET ASSETS	**$ 916,008**	**$ 1,570,294**	**$ (71,353)**	**$ (16,903)**	**$ 71,086**	**$ 101,214**	**$ (12,300)**	**$ (163,065)**	**$ 903,441**	**$ 1,491,540**	**165%**

*The 2024-25 preliminary actual operating expenses include $211,117 in administrative overhead assessments charged as 5% of operating revenues.
Absent these indirect costs, the preliminary change in net assets of all Auxiliary Enterprises is $1.7 million.

**$936,716 was transferred as a reserve from the Annual Fund & Unrestricted Giving program for the Tower Renovation project and to support Academe at 198 for debt service needs.

**$525,610 is the cash transfer from Special Events& Guest Services to the non-state college-wide support fund.
Exclude these transfers and the administrative overhead assessments, the preliminary change in net assets of all Auxiliary Enterprises is $1.29 million.

Auxiliary Enterprises - McAllister Tower
Budget Status Report - Preliminary 2024-25 Year-end

	Beginning Budget 2024-25	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Preliminary Actual as Percent of Revised Budget	Year-end Actual 2023-24
REVENUES						
Apartment & Commercial Rent	-	-	(4,000)		-	353,103
Other	-	-	-		-	4,527
TOTAL OPERATING REVENUES	**$ -**	**$ -**	**$ (4,000)**	*	**-**	**$ 357,630**
EXPENSES						
Student Wages--Regular & Work-study	-	-	-		-	5,056
Regular Contract Services	-	-	-		-	97,757
Utilities	-	-	-		-	365,170
Maintenance & Special Repairs	-	-	-		-	105,231
Insurance	100,000	100,000	100,000		100%	210,065
Supplies	-	54	54		101%	507
Printing & Reproduction	-	2	1		70%	104
Telephone & Mail	-	201	201		100%	2,470
Computer Software	-	-	-		-	14,372
Miscellaneous	-	451	(6,339)		-1406%	3,864
Equipment & Building Improvements	-	-	-		-	14,832
Overhead Pro Rata	-	-	-	*	-	17,882
TOTAL OPERATING EXPENSES	**$ 100,000**	**$ 100,708**	**$ 93,918**	*	**93%**	**$ 837,311**
NET OPERATIONS	**$ (100,000)**	**$ (100,708)**	**$ (97,918)**		**97%**	**$ (479,681)**
NONOPERATING REVENUES/EXPENSES						
Investment Income	80,000	80,000	64,471		81%	75,112
Realized Gain/Loss from Sale of Investments	-	-	361		--	-
Unrealized Gain/Loss on Investments	-	-	666,664	*	--	575,703
Transfer to/from Other Funds	-	936,716	936,716	*	100%	-
NET NONOPERATIONS	**$ 80,000**	**$ 1,016,716**	**$ 1,668,212**		**164%**	**$ 650,815**
TOTAL CHANGE IN NET ASSETS	**$ (20,000)**	**$ 916,008**	**$ 1,570,294**		**171%**	**$ 171,134**

* See attached narrative.

	Beginning Budget 2024-25	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Preliminary Actual as Percent of Revised Budget	Year-end Actual 2023-24
REVENUES						
Parking Operations	2,798,000	2,613,000	2,590,316	*	99%	2,587,715
Parking Tax	(370,000)	(303,750)	(355,900)		117%	(368,985)
Retail Leases	288,000	228,000	48,294	*	21%	218,222
Other (including Storage)	8,000	8,000	-		0%	338
TOTAL OPERATING REVENUES	**$ 2,724,000**	**$ 2,545,250**	**$ 2,282,710**		**90%**	**$ 2,437,290**
EXPENSES						
Salaries and Wages	314,525	313,983	310,402		99%	303,314
Staff Benefits	145,192	144,820	131,523		91%	130,338
Regular Contract Services	5,000	5,000	-		0%	15,722
Utilities	90,500	90,500	88,010		97%	92,317
Maintenance & Special Repairs	235,409	217,669	216,080		99%	78,828
Insurance	148,353	129,085	129,085		100%	148,352
Supplies & Noncapital Equipment	7,500	5,000	4,971		99%	7,535
Printing, Telephone and Mail	15,000	13,000	10,346		80%	10,495
Credit Card & Bank Fees	74,200	74,200	82,372		111%	81,848
Miscellaneous	18,084	18,084	14,957		83%	17,448
Overhead Pro Rata	136,200	127,262	126,860	*	100%	121,613
TOTAL OPERATING EXPENSES	**$ 1,189,963**	**$ 1,138,603**	**$ 1,114,605**	*	**98%**	**$ 1,007,811**
NET OPERATIONS	**$ 1,534,037**	**$ 1,406,647**	**$ 1,168,105**		**83%**	**$ 1,429,479**
NONOPERATING REVENUES/EXPENSES						
Investment Income	-	-	40,864	*	-	28,862
Funded from Bond Proceeds	13,936	13,936	13,937		100%	13,936
Debt Service (Principal & Interest)	(1,491,936)	(1,491,936)	(1,482,123)		99%	(1,479,873)
Capital Asset Additions (GASB 87)	-	-	914,614	*	-	497,210
Capital Asset Deductions (GASB 87)	-	-	(715,285)	*	-	(489,612)
Nonmandatory Transfers to/from Other Funds	-	-	44,389		-	2,374
Cash Short/Over	-	-	(1,404)		-	(342)
NET NONOPERATIONS	**$ (1,478,000)**	**$ (1,478,000)**	**$ (1,185,008)**		**80%**	**$ (1,427,446)**
TOTAL CHANGE IN NET ASSETS	**$ 56,037**	**$ (71,353)**	**$ (16,903)**		**24%**	**$ 2,033**

*See attached narrative.

	Beginning Budget 2024-25	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Preliminary Actual as Percent of Revised Budget	Year-end Actual 2023-24
REVENUES						
Fees	1,139,295	1,144,932	1,144,891	*	100%	$ 1,170,714
TOTAL OPERATING REVENUES	**$ 1,139,295**	**$ 1,144,932**	**$ 1,144,891**		**100%**	**$ 1,170,714**
EXPENSES						
Salaries and Wages	136,820	121,724	115,415		95%	134,439
Staff Benefits	60,891	52,372	46,770		89%	55,375
Contracted Temporary Help	0	12,000	22,851		190%	0
Consultants and Contracted Services	829,987	829,987	837,694		101%	872,877
Supplies	1,000	1,000	0		0%	0
Printing and Mail	100	80	30		38%	0
Travel and Training	2,500	500	0		0%	-
Miscellaneous	620	11,636	11,636		100%	-
Events	300	300	36		12%	-
Overhead Pro Rata	56,965	57,247	57,245	*	100%	58,536
TOTAL OPERATING EXPENSES	**$ 1,089,183**	**$ 1,086,846**	**$ 1,091,676**	*	**100%**	**$ 1,121,227**
NET OPERATIONS	**$ 50,112**	**$ 58,086**	**$ 53,215**		**92%**	**$ 49,487**
NONOPERATING REVENUES/EXPENSES						
Investment Income	6,000	13,000	19,950		153%	13,962
Realized Gain/Loss from Sale of Investments	-	-	15		--	-
Unrealized Gain/Loss on Investments	-	-	28,034	*	--	24,209
NET NONOPERATIONS	**$ 6,000**	**$ 13,000**	**$ 47,999**		**369%**	**$ 38,171**
TOTAL CHANGE IN NET ASSETS	**$ 56,112**	**$ 71,086**	**$ 101,214**		**142%**	**$ 87,658**

*See attached narrative.

UC LAW SAN FRANCISCO

09/12/25

Auxiliary Enterprises - Special Events and Guest Services

Budget Status Report - Preliminary 2024-25 Year-end

	Beginning Budget 2024-25	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Preliminary Actual as Percent of Revised Budget	Year-end Actual 2023-24
REVENUES						
Room Rental	$ 612,375	$ 643,494	$ 540,734	*	84%	$ 451,241
TOTAL OPERATING REVENUES	**$ 612,375**	**$ 643,494**	**$ 540,734**		**84%**	**$ 451,241**
EXPENSES						
Staff Salaries and Wages	140,000	124,946	94,977	*	76%	90,116
Staff Benefits	61,150	48,628	37,458	*	77%	33,305
Other Contract Services	30,000	7,500	2,337	*	31%	-
Supplies	20,000	19,000	21,862		115%	22,095
Printing and Mail	1,500	1,500	409		27%	986
Miscellaneous	17,000	17,120	21,494		126%	17,477
Overhead Pro Rata	30,619	32,150	27,012	*	84%	22,562
TOTAL OPERATING EXPENSES	**$ 300,269**	**$ 250,844**	**$ 205,549**		**82%**	**$ 186,541**
NET OPERATIONS	**$ 312,106**	**$ 392,650**	**$ 335,185**		**85%**	**$ 264,700**
NONOPERATING REVENUES/EXPENSES						
Investment Income	8,400	3,700	27,517	*	744%	16,474
Capital Asset Additions (GASB 87)	-	-	244,805			244,537
Capital Asset Deductions (GASB 87)	-	-	(244,961)			(244,961)
Nonmandatory Transfers to/from Other Funds	(320,506)	(408,650)	(525,610)	*	129%	(280,750)
NET NONOPERATIONS	**$(312,106)**	**$(404,950)**	**$ (498,250)**		**123%**	**$ (264,700)**
TOTAL CHANGE IN NET ASSETS	**$ -**	**$ (12,300)**	**$ (163,065)**		**--**	**$ -**

*See attached narrative.

REPORT ITEM

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

2. SUBJECT: FY 2024-25 Preliminary Year-end Budget Status Report
-Academe at 198 & AVFA

3. REPORT:

Attached are preliminary budget reports for The Academe at 198 McAllister and the Academic Village Finance Authority (AVFA, formerly Hastings Campus Housing Finance Authority) as of the end of the fiscal year 2024-25. Major variances and key highlights are discussed below.

THE ACADEME AT 198

Revenues

- **Residential Rent, Rent Subsidy, and DSCR Grant** – The revenue from renting residential units in 2024-25 was budgeted at $13.58 million, reflecting an occupancy rate of 79%. As of the preliminary end of the fiscal year 2024-25, 101% of the budgeted revenue, totaling $13.67 million, has been recorded.

  The revenue budget also included a $2.6 million subsidy, which allowed for a 13% average reduction in rental prices charged to non-UCSF residents, and the $0.2 million supplement for a one-month free offer. Both transfers were completed.

  Additionally, the Board of Directors approved the 1.2 DSCR Grant, estimated to be $3.95 million. Currently, 53% or $2.1 million of the 1.2 DSCR Grant has been transferred to the Academe. Additional transfers may occur due to the ongoing inflow of expense invoices.

- **Retail Leases -** The retail revenue of $70,250, derived from the rental of Spro Cafe, aligns with the budget. The retail space on Golden Gate Avenue remains vacant.

- **Other Revenue -** Revenue in this category, which is derived from event space rental and on-site laundry machines, surpassed the projected amount by 36%. This increase was primarily due to event space rental exceeding its initial projection.

Expenditures

- **All expenditures** performed close to budget, with actuals slightly below the projected figures due to outstanding invoices. The largest categories were Utilities (40% of total expenses), Regular Contract Services* (19%), Salaries and Benefits (16%), Insurance (9%), Maintenance, and Special Repairs** (9%).

  *Regular Contract Services include janitorial, engineering, and window washing services
  **Maintenance and Special Repairs include ongoing building and elevator maintenance, pest control, window washing, and landscaping.

ACADEMIC VILLAGE FINANCE AUTHORITY (AVFA)
(Formerly Hastings Campus Housing Finance Authority)

Expenditures

- **Building Depreciation** - The depreciation in FY 24-25 amounts to $ 4,375,025.
  The College budget is prepared using the Modified Accrual Method for the purpose of reporting the budget to the Department of Finance. Because this method excludes non-cash expenses like depreciation or accreted interest, a variance exists when comparing the budget to actual outcomes.

Non-Operating Revenues / (Expenses)

- **Investment Income** – All funds managed by the Trustee earn interest, which is exclusively designated for debt service. In FY 24-25, interest income reached $1.4 million, representing 143% of the budgeted amount. The higher-than-budgeted interest income is attributable to the conservative budgeting methodology intended to mitigate the impact of potential interest rate changes throughout the fiscal year.

- **Other revenue -** The revenue in this category consists of a reimbursement and a refund from PG&E, both of which relate to the construction period of the Academe at 198. Both payments were received after the project's finalization.

- **Debt Service (Principal and Interest)** The Debt Service in FY 24/25 was $16,655,500. The actual includes the accreted interest for Series 2020B (non-cash expenses), causing a budget-to-actuals variance. The budget, prepared using the Modified Accrual Method, does not account for accreted interest.

SUMMARY

The budgeted change in net assets for the Academe 198 and the AVFA for the 2024-25 fiscal year, excluding depreciation, is $1.45 million.

	The Academe at 198		AVFA				
	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25	Total Revised Budget 2024-25	Total Preliminary Year-end Actual 2024-25	Total Preliminary Actual as a Percent of Revised Budget
Revenues	22,912,128	21,176,586	-	-	22,912,128	21,176,586	92%
Expenditures	2,909,381	2,514,925	6,950	4,381,475	2,916,331	6,896,400	236%
Net Operations	**$ 20,002,747**	**$ 18,661,661**	**$ (6,950)**	**$ (4,381,475)**	**$ 19,995,797**	**$ 14,280,187**	**71%**
Nonoperating Revenues/(Expenses)**							
Investment Income	-		1,000,000	1,434,561	1,000,000	1,434,561	143%
Other Revenue	-		149,654	202,995	149,654	202,995	136%
Debt Service	-		(16,655,500)	(18,836,574)	(16,655,500)	(18,836,574)	113%
Transfers between 198 and Authority	-	-	-	-	-	-	--
Transfers from Other Funds	-	-	-	-	-	-	--
Transfers to Other Funds	-	-	-	-	-	-	--
Sub-total	**$ -**	**$ -**	**$ (15,505,846)**	**$ (17,199,018)**	**$ (15,505,846)**	**$ (17,199,018)**	**111%**
TOTAL CHANGE IN NET ASSETS*	**$ 20,002,747**	**$ 18,661,661**	**$ (15,512,796)**	**$ (21,580,493)**	**$ 4,489,951**	**$ (2,918,831)**	**-65%**

*Transfers within the Authority (Authority / The Academe at 198 / Bonds Series A and Series B) are excluded as they net out.

Attachment:

- FY 2024-25 Preliminary Year-end Budget Status Report for Academic Village Finance Authority Programs

UC LAW SAN FRANCISCO
Campus Housing Authority Programs
2024-25 Budget Status Summary

09/12/25

	The Academe at 198		AVFA				
	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25	Total Revised Budget 2024-25	Total Preliminary Year-end Actual 2024-25	Total Preliminary Actual as a Percent of Revised Budget
Revenues	22,912,128	21,176,586	-	-	22,912,128	21,176,586	92%
Expenditures*	2,909,381	2,514,925	6,950	4,381,475	2,916,331	6,896,400	236%
Net Operations	**$ 20,002,747**	**$ 18,661,661**	**$ (6,950)**	**$ (4,381,475)**	**$ 19,995,797**	**$ 14,280,187**	**71%**
Nonoperating Revenues/(Expenses)**							
Investment Income	-		1,000,000	1,434,561	1,000,000	1,434,561	143%
Other Revenue	-		149,654	202,995	149,654	202,995	136%
Debt Service	-		(16,655,500)	(18,836,574)	(16,655,500)	(18,836,574)	113%
Transfers between 198 and Authority	-	-	-	-	-	-	--
Transfers from Other Funds	-	-	-	-	-	-	--
Transfers to Other Funds	-	-	-	-	-	-	--
Sub-total	**$ -**	**$ -**	**$ (15,505,846)**	**$ (17,199,018)**	**$ (15,505,846)**	**$ (17,199,018)**	**111%**
TOTAL CHANGE IN NET ASSETS*	**$ 20,002,747**	**$ 18,661,661**	**$ (15,512,796)**	**$ (21,580,493)**	**$ 4,489,951**	**$ (2,918,831)**	**-65%**

* Actual includes building depreciation of $4.38 million. The FY 2024-25 preliminary total change in net assets is $1.45 million when excluding depreciation.
**Transfers within the Authority (Authority / The Academe at 198 / Bonds Series A and Series B) are excluded as they net out.

UC LAW SAN FRANCISCO
The Academe at 198
Budget Status Report - 2024-25 Preliminary Year-end

09/12/25

	Beginning Budget 2024-25	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Preliminary Year-end Actual as a Percent of Revised Budget	Year-end Actual 2023-24
REVENUES						
Residential Rent	17,570,000	13,586,391	13,673,788	*	101%	8,773,628
Residential Rent Subsidy	2,810,000	2,810,000	2,810,200	*	100%	1,413,275
DSCR Grant	-	3,950,000	2,100,000	*	53%	-
Commercial Rent	2,222,359	2,424,392	2,424,391		100%	2,157,630
Retail Leases	72,000	69,345	70,250	*	101%	11,500
Other Revenue	108,148	72,000	97,957	*	136%	57,065
TOTAL OPERATING REVENUES	**$ 22,782,507**	**$ 22,912,128**	**$ 21,176,586**		**92%**	**$ 12,413,098**
EXPENSES						
Salaries and Wages	310,789	306,609	294,674	*	96%	224,959
Student Wages--Regular & Work-study	2,000	-	-		--	-
Staff Benefits	130,409	124,546	117,042	*	94%	92,996
Regular Contract Services	289,010	498,202	474,806	*	95%	161,003
Other Contract Services	54,000	63,200	46,266		73%	81,310
Utilities	1,092,100	1,284,000	1,034,667	*	81%	554,345
Maintenance & Special Repairs	79,200	201,468	150,720	*	75%	37,819
Insurance	215,064	209,971	209,971	*	100%	210,064
Supplies	29,115	62,885	54,216		86%	44,753
Computer Software	102,000	102,000	91,971		90%	80,992
Printing & Reproduction	12,500	2,500	3,890		156%	10,052
Marketing	29,505	20,000	14,979		75%	13,502
Miscellaneous	48,405	34,000	21,723		64%	46,825
TOTAL OPERATING EXPENSES	**$ 2,394,097**	**$ 2,909,381**	**$ 2,514,925**		**86%**	**$ 1,558,621**
NET OPERATIONS	**$ 20,388,410**	**$ 20,002,747**	**$ 18,661,661**		**93%**	**$ 10,854,477**
NONOPERATING REVENUES (EXPENSES)						
Building Improvements	-	-	-		--	(274,188)
Transfers between 198 and Authority	-	-			--	-
Transfers from Other Funds	-	-	-		--	1,180,000
Transfers to Other Funds	-	-	-		--	-
CIP Offset	-	-	-		--	274,188
Capital Asset Additions/Deductions	-	-	-		--	(262,688)
TOTAL NONOPERATING REVENUES (EXPENSES)	**$ -**	**$ -**	**$ -**		**-**	**$ 917,312**
TOTAL CHANGE IN NET ASSETS	**$ 20,388,410**	**$ 20,002,747**	**$ 18,661,661**		**92%**	**$ 11,771,789**

* See attached narrative report.

UC LAW SAN FRANCISCO
Academic Village Finance Authority
Budget Status Report - 2024-25 Preliminary Year-end

09/12/25

	Beginning Budget 2024-25	Revised Budget 2024-25	Preliminary Year-end Actual 2024-25		Preliminary Year-end Actual as a Percent of Revised Budget	Year-end Actual 2023-24
REVENUES						
Other	-	-	-		--	-
TOTAL OPERATING REVENUES	**$ -**	**$ -**	**$ -**		**--**	**$ -**
EXPENDITURES						
Consultants	3,000	3,000	3,000		100%	2,500
Audit Services	2,625	3,450	3,450		100%	2,625
Miscellaneous	500	500	-		0%	-
Building Depreciation	-	-	4,375,025	*	--	2,908,885
TOTAL OPERATING EXPENDITURES	**$ 6,125**	**$ 6,950**	**$ 4,381,475**		**63043%**	**$ 2,914,010**
NET OPERATIONS	**$ (6,125)**	**$ (6,950)**	**$ (4,381,475)**		**63043%**	**$ (2,914,010)**
NONOPERATING REVENUES (EXPENSES)						
Investment Income	-	1,000,000	1,434,561	*	143%	529,464
Other Revenue	-	149,654	202,995	*	136%	-
Capital, Buildings	-	-	-		--	(36,176,958)
Capital Asset Additions/Deductions	-	-	-		--	274,188
CIP Offset	-	-	-		--	36,176,958
Debt Service (Principal & Interest)	(16,655,500)	(16,655,500)	(18,836,574)	*	113%	(18,675,699)
Transfers between 198 and Authority	-	-	-		--	-
Transfers from Other Funds	6,125	-	-		--	317,450
Transfers to Other Funds	-	-	-		--	-
TOTAL NONOPERATING REVENUES (EXPENSES)	**$ (16,649,375)**	**$ (15,505,846)**	**$ (17,199,018)**		**111%**	**$ (17,554,597)**
TOTAL CHANGE IN NET ASSETS	**$ (16,655,500)**	**$ (15,512,796)**	**$ (21,580,493)**		**139%**	**$ (20,468,607)**

* See attached narrative report.

REPORT ITEM

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

2. SUBJECT: Annual Report on Insurance Coverage 2025-26

3. REPORT:

Annual Insurance Summary Fiscal Year 2025–2026

The property insurance market remains dynamic, though generally more stable than in recent years. For the 2025-2026 policy period, UC Law SF continues its strategic approach to risk financing and coverage procurement, maintaining partnerships that balance cost efficiency with robust coverage.

Property, Cyber, and Pollution Liability Coverage

The College remains a participant in Alliant's Public Entity Property Insurance Program (APIP), which consolidates property, cyber, and pollution liability coverage under one comprehensive structure. This program continues to deliver competitive premiums with enhanced cyber liability protections.

Optional Cyber Coverage Enhancements

UC Law SF has the option to augment its current cyber liability coverage through an APIP Cyber Excess Policy, underwritten by Liberty Surplus Insurance Corporation. This optional policy would increase aggregate limits by an additional $2 million and provide enhanced sub-limits in several key areas:

- Breach Response/Notification Expense Costs: Up to $1,000,000 (Beazley Vendors)
- Business Interruption (BI): Up to $750,000 (Security Breach); $500,000 (System Failure)
- Cyber Extortion, Data Recovery, and Dependent BI: Up to $750,000
- Other enhancements: Includes coverage for Invoice Manipulation, Fraudulent Instruction, Funds Transfer Fraud, and more.

The baseline cyber premium of $18,000 includes the $2 million limit. Optional excess cyber policy is available for an additional $30,000, bringing total cyber limits to $4 million.

Workers' Compensation

The College remains self-insured for workers' compensation and maintains excess coverage through the Public Risk Innovation, Solutions, and Management (PRISM) program. There were no major changes to this line for the current policy year.

Premium Summary

For the 2025–2026 fiscal year, total insurance costs amount to $1,512,899, representing a 6.45% increase over the prior year. This increase of approximately $91,671 is attributed to:

- Market-wide adjustments in commercial and excess liability lines
- Increased rates in key program components, with some lines experiencing 10%-15% escalations
- Full-year coverage for core property and liability lines following structural changes implemented last year

While some categories have experienced premium increases, other lines of coverage such as cyber and property coverage remain stable or improved in cost-to-coverage ratios. Overall, these shifts are aligned with industry trends.

Line of Coverage	``	2024-25 Premium	Surplus Lines Tax	Surplus Lines Fee	Other Tax/Fees	2024-25 Total Cost	2025-26 Premium	Surplus Lines Tax	Surplus Lines Fee	Other Tax/Fees	2025-26 Total Cost	% Change	$ Change
General Liability	United Educators	104,164.00	n/a	n/a	n/a	104,164.00	111,545.00	n/a	n/a	n/a	111,545.00	7.09%	7,381
Excess Liability ($30M xs Primary)	United Educators	243,159.00	n/a	n/a	n/a	243,159.00	284,401.00	n/a	n/a	n/a	284,401.00	16.96%	41,242
Educators Legal	United Educators	250,491.00	n/a	n/a	n/a	250,491.00	287,890.00	n/a	n/a	n/a	287,890.00	14.93%	37,399
Licensed Professional Liability	United Educators	21,257.00	n/a	n/a	n/a	21,257.00	22,495.00	n/a	n/a	n/a	22,495.00	5.82%	1,238
UE Package Total	United Educators					619,071.00					706,331.00	14.10%	87,260
Excess Liability ($10M xs GL/ $10M xs $25M ELL)	AWAC	121,000.00	3,630.00	217.80	n/a	124,847.80	139,293.00	4,178.79	250.73	n/a	143,722.52	15.12%	18,875
Excess Liability ($10M xs $40M GL/ $10M xs $35M	Liberty Surplus	88,000.00	2,640.00	158.40	n/a	90,798.40	101,116.00	3,033.48	182.01	n/a	104,331.49	14.90%	13,533
Auto Liability (1 units)	State of CA	836.00	n/a	n/a	n/a	836.00	1,808.00	n/a	n/a	n/a	1,808.00	116.27%	972
Property	APIP Property - $250,000 Deductible	447,007.00	n/a	n/a	n/a	447,007.00	416,854.00	Incl.	Incl.	Incl.	416,854.00	-6.75%	(30,153)
Cyber Liability	APIP Core Cyber	16,680.00	1,125.30	67.52	545.00	18,417.82	18,081.00	Incl.	Incl.	Incl.	18,081.00	-1.83%	(337)
Pollution Liability	APIP	4,808.00	144.24	8.65	n/a	4,960.89	5,009.00	Incl.	Incl.	Incl.	5,009.00	0.97%	48
Crime	National Union Fire Ins Co (ACIP)	6,025.00	n/a	n/a	n/a	6,025.00	6,175.00	n/a	n/a	n/a	6,175.00	2.49%	150
Workers' Compensation	PRISM	111,155.00	Incl	Incl	Incl	111,155.00	118,232.00	Incl	Incl	Incl	118,232.00	6.37%	7,077
		1,414,582.00	**7,539.54**	**452.37**	**545.00**	**1,423,118.91**	**1,512,899.00**	**7,212.27**	**432.74**	**0.00**	**1,520,544.01**	6.85%	97,425

McAllister Tower

The 100 McAllister Tower continues to be insured separately under a builder's risk policy. This approach supports risk isolation and cost management as construction and renovation activities progress.

Attachments

- UC Law SF Commercial Insurance Binders 2025-2026

EVIDENCE OF PROPERTY INSURANCE

ISSUE DATE (MM/DD/YY)
07/01/25

THIS IS EVIDENCE THAT INSURANCE AS IDENTIFIED BELOW HAS BEEN ISSUED, IS IN FORCE, AND CONVEYS ALL THE RIGHTS AND PRIVILEGES AFFORDED UNDER THE POLICY.

PRODUCER

ALLIANT INSURANCE SERVICES, INC.
560 MISSION STREET, 6TH FLOOR
SAN FRANCISCO, CA 94105
PH (415) 403-1400 / FAX (415) 402-0773
LICENSE NO. 0C36861

CODE **SUB-CODE**

COMPANY

VARIOUS PER ATTACHED SCHEDULE

INSURED

ALLIANT PROPERTY INSURANCE PROGRAM (APIP)

UC COLLEGE OF THE LAW, SAN FRANCISCO
200 MCALLISTER STREET
SAN FRANCISCO, CA 94102

EVIDENCE NUMBER	REFERENCE NUMBER
APIP25-26	APIP2025 (Dec 28) 0928

EFFECTIVE DATE (MM/DD/YY)	EXPIRATION DATE (MM/DD/YY)	CONT. UNTIL TERMINATED IF CHECKED	
07/01/25	07/01/26		☐

THIS REPLACES PRIOR EVIDENCE DATED:

PROPERTY INFORMATION

LOCATION / DESCRIPTION

PENDING RECEIPT OF COMPANY POLICY(IES), THIS DOCUMENTATION IS PROVIDED AS EVIDENCE OF PROPERTY AND BOILER & MACHINERY INSURANCE COVERAGE FOR LOCATIONS ON FILE WITH ALLIANT INSURANCE SERVICES.

COVERAGE INFORMATION

COVERAGE / PERILS / FORMS / AMOUNT OF INSURANCE & DEDUCTIBLE

"ALL RISK" OF DIRECT PHYSICAL LOSS OR DAMAGE AND ALL EXTENSIONS AND SUBLIMITS OF COVERAGE PER PEPIP MANUSCRIPT POLICY FORM. SUBJECT TO POLICY TERMS, CONDITIONS AND EXCLUSIONS.

LIMITS & DEDUCTIBLE ATTACHED FOR THE FOLLOWING:

[X] PROPERTY COVERAGE

[X] BOILER & MACHINERY COVERAGE

REMARKS (INCLUDING SPECIAL CONDITIONS)

CANCELLATION

SEE ATTACHED

ADDITIONAL INTEREST

NAME AND ADDRESS

EVIDENCE OF COVERAGE

NATURE OF INTEREST

☐ **MORTGAGEE**

☐ **ADDITIONAL INSURED**

☐ LOSS PAYEE

[X] (OTHER) EVIDENCE OF COVERAGE

SIGNATURE OF AUTHORIZED AGENT OF COMPANY

ALLIANT PROPERTY INSURANCE PROGRAM

2025-2026

NAMED INSURED SCHEDULE

AS OF 07/07/2025

THE NAMED INSURED IS:

UC College of the Law, San Francisco

200 McAllister Street

San Francisco, CA 94102

Named Insured shall be deemed the sole agent of each and every Named Insured for the purpose of:

(1) Giving notice of cancellation,

(2) Giving instructions for changes in the Policy and accepting changes in this Policy

(3) The payment of assessments / premiums or receipt of return assessments / premiums.

Member(s), entity(ies), agency(ies), organization(s), enterprise(s) and/or individual(s) for whom the Named Insured has extended coverage is as follows:

NAMED INSURED MEMBER(S)

UC College of the Law, San Francisco

Alliant Property Insurance Program
2025-2026 Policy Year
Schedule of Insurers (Bound)

Company	A.M. Best's I.D. #	A.M. Best's Guide Rating	Standard and Poor's
Amherst Specialty Insurance Company	021748	A-, Excellent; Financial Size Category 8; $100,000,000 to less than $250,000,000 (As of 4/2/2025)	Not Rated (As of 5/21/25)
Arch Specialty Insurance Company	012523	A+, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 03/07/25)	A+ (As of 06/20/24)
Associated Industries Insurance Company Inc.	011693	A-, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 09/06/24)	Not Rated (As of 05/13/25)
AXA XL Reinsurance Ltd	074684	A+, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 10/02/24)	AA- (As of 03/24/25)
AXIS Surplus Insurance Company	012515	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 08/28/24)	A+ (As of 07/17/24)
Beazley Excess & Surplus Insurance, Inc	021670	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 07/18/24)	Not Rated (As of 05/20/25)
Chubb European Group SE	086485	A++, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 12/12/24)	AA (As of 01/27/25)
Columbia Casualty Company	003538	A, Excellent Financial Size Category 15; $2,000,000,000 or Greater (As of 12/5/24)	A+ (as of 11/07/24)
Convex Insurance UK Limited	071499	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 05/30/24)	A- (As of 06/18/24)
Endurance Worldwide Insurance Limited	083234	A+, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 09/27/24)	A+ (As of 03/28/25)
Evanston Insurance Company	003759	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 11/22/24)	A (As of 07/26/24)
Fidelis Insurance Bermuda Limited / Fidelis Underwriting Limited	093763 093764	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 02/28/25)	A- (As of 04/03/25)

Alliant Property Insurance Program
2025-2026 Policy Year
Schedule of Insurers (Bound)

Company	A.M. Best's I.D. #	A.M. Best's Guide Rating	Standard and Poor's
Fortegra Specialty Insurance Company (Alchemy Underwriting Ltd.)	020936	A- (Excellent); Financial Size Category 10; $500,000,000 to less than $750,000,000 (As of 04/17/25)	Not Rated (As of 06/18/25)
Harleysville Insurance Company of New York	012051	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 11/07/24)	A+ (As of 04/12/25)
Houston Specialty Insurance Company	013825	A, Excellent; Financial Size Category 10; $500,000,000 to less than $750,000,000 (As of 08/01/24)	Not Rated (As of 05/21/25)
Ironshore Specialty Insurance Company	013866	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 08/02/24)	A (As of 11/07/24)
Landmark American Insurance Company	012619	A++, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 02/14/25)	AA+ (As of 09/25/24)
Lexington Insurance Company	002350	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 12/06/24)	AA- (As of 05/15/25)
Liberty Surplus Insurance Corporation	012078	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 08/02/24)	A (As of 11/07/24)
Lloyd's of London various syndicates	085202	A+, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 08/07/24)	AA- (As of 06/14/24)
National Fire & Marine Insurance Company	002428	A++, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 04/09/25)	AA+ (As of 09/25/24)
Palms Specialty Insurance Company, Inc.	021278	A-, Excellent; Financial Size Category 10; $500,000,000 to less than $750,000,000 (As of 06/20/24)	Not Rated (As of 5/21/25)
Partner Reinsurance Europe SE	078853	A+, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 02/07/25)	AA- (As of 03/05/25)

Alliant Property Insurance Program
2025-2026 Policy Year
Schedule of Insurers (Bound)

Company	A.M. Best's I.D. #	A.M. Best's Guide Rating	Standard and Poor's
SiriusPoint International Insurance Corporation (Arcadian Risk Capital (UK) Ltd.)	086396	A- (Excellent); Financial Size Category 15; $2,000,000,000 or Greater (As of 04/25/25)	A- (As of 01/24/25)
StarStone Specialty Insurance Company	011432	A, Excellent Financial Size Category 13; $1,2500,000,000 to less than $1,500,000,000 (As of 08/24/24)	Not Rated (As of 06/16/25)
Swiss Re Corporate Solutions America Insurance Corporation	001866	A+, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 09/26/24)	AA- (As of 03/11/25)
The Princeton Excess and Surplus Lines Insurance Co	012170	A+, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 07/18/24)	AA (As of 04/24/25)
Tokio Marine America Insurance Company	012340	A++, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 09/06/24)	A+ (As of 02/21/25)
United Specialty Insurance Company	013105	A, Excellent; Financial Size Category 10; $500,000,000 to less than $750,000,000 (As of 11/22/24)	Not Rated (As of 05/21/25)
Westchester Surplus Lines Insurance Company	004433	A++, Superior; Financial Size Category 15; $2,000,000,000 or Greater (As of 12/12/24)	AA (As of 01/27/25)
Westfield Specialty Insurance Company	020985	A, Excellent; Financial Size Category 15; $2,000,000,000 or Greater (As of 03/04/25)	Not Rated (As of 05/21/25)

ALLIANT INSURANCE SERVICES, INC.
ALLIANT PROPERTY INSURANCE PROGRAM (APIP)
PROPERTY EVIDENCE ATTACHMENT

TYPE OF INSURANCE:	☒ Insurance ☐ Reinsurance
NAMED INSURED:	UC College of the Law, San Francisco
DECLARATION:	28-Education 1
POLICY PERIOD:	July 1, 2025 to July 1, 2026
REFERENCE NUMBER:	APIP2025 (Dec 28) 0928
COMPANIES:	See Attached List of Companies
TOTAL INSURED VALUES:	$ 471,433,669 as of June 30, 2025

ALL RISK COVERAGES & SUB-LIMITS:	$ 500,000,000	Per Occurrence: all Perils, Coverages (subject to policy exclusions) and all Named Insureds (as defined in the policy) combined, per Declaration, regardless of the number of Named Insureds, coverages, extensions of coverage, or perils insured, subject to the following per occurrence and/or aggregate sub-limits as noted below.
	$ 25,000,000	Flood Limit - Per Occurrence and in the Annual Aggregate (for those Named Insured(s) that purchase this optional dedicated coverage).
	Not Covered	Per Occurrence and in the Annual Aggregate for scheduled locations in Flood Zones A & V (inclusive of all 100 year exposures). This Sub-limit does not increase the specific flood limit of liability for those Named Insured(s) that purchase this optional dedicated coverage.
	Not Applicable	Per Occurrence for losses to locations in Tier 1 and/or Tier 2 Counties and resulting from a Named Windstorm.
	Not Covered	Earthquake Shock - Per Occurrence and in the Annual Aggregate (for those Named Insured(s) that purchase this optional dedicated coverage).
	$ 100,000,000	Combined Business Interruption, Rental Income and Tuition Income (and related fees). However, if specific values for such coverage have not been reported as part of the Named Insured's schedule of values held on file with Alliant Insurance Services, Inc., this sub-limit amount is limited to $500,000 per Named Insured subject to maximum of $2,500,000 Per Occurrence, Per Declaration for Business Interruption, Rental Income and Tuition Income combined. Coverage for power generating plants is excluded, unless otherwise specified.
	$ 75,000,000	Extra Expense.
ALL RISK COVERAGES & SUB-LIMITS: (continued)	$ 10,000,000	Miscellaneous Unnamed Locations for Named Insureds excluding Earthquake Shock coverage for Alaska and California locations. If Flood coverage is purchased for scheduled locations, this extension will extend to include Flood coverage for any location not situated in Flood Zones A or V.

		180 Days	Extended Period of Indemnity
		See Policy Provisions	$50,000,000, or a Named Insured's Policy Limit of Liability if less than $50,000,000, Automatic Acquisition for 120 days except: - $25,000,000 Automatic Acquisition for 90 days for new sub-member and/or entity of an existing Pools, JPA or Group; - $25,000,000 Automatic Acquisition for 90 days for Vacant properties; - $10,000,000 Automatic Acquisition for 120 days for Licensed Vehicles; - $2,500,000 Automatic Acquisition for 60 days for additional property and/or interests in Tier 1 Wind Counties, Parishes and Independent Cities for the states of Virginia, North Carolina, South Carolina, Georgia, Alabama, Mississippi, Louisiana, Texas and/or situated anywhere within the states of Florida and Hawaii; - The peril of Earthquake Shock is excluded for the states of Alaska and California; - If Flood coverage is purchased for all scheduled locations, this extension will extend to include Flood coverage for any location not situated in Flood Zones A or V.
	$	1,000,000	Unscheduled Landscaping, tees, sand traps, greens, athletic fields and artificial turf; however, replacement of trees, plants and shrubs will be limited to the actual size of the destroyed plant, tree or shrub at the time of the loss up to a maximum size of 25 gallons per item but not to exceed $25,000 per item for existing Named Insureds excluding Earthquake Shock coverage for Alaska and California locations. If Flood coverage is purchased for scheduled locations, this extension includes Flood coverage for any location not situated in Flood Zones A or V.
	$	5,000,000	or 110% of the scheduled values, whichever is greater, for Scheduled Landscaping, tees, sand traps, greens, athletic fields and artificial turf; however, replacement of trees, plants and shrubs will be limited to the actual size of the destroyed plant, tree or shrub at the time of the loss up to a maximum size of 25 gallons per item but not to exceed $25,000 per item.
	$	5,000,000	or 120% of the scheduled values, whichever is less, for Scheduled Landfills (as more fully defined in the policy).
	$	50,000,000	Errors & Omissions - This extension does not increase any more specific limit stated elsewhere in this policy or Declarations.
	$	25,000,000	Course of Construction and Additions (including new) for projects with completed values not exceeding the sub-limit shown. Projects valued greater than $15,000,000 require underwriting approval and a premium charge.
ALL RISK COVERAGES & SUB-LIMITS: (continued)	$	500,000	Money & Securities for named perils only as referenced within the policy, however fraudulent impersonation, fraudulent instruction or similar events are excluded.

$	2,500,000	Unscheduled Fine Arts.
$	250,000	Accidental Contamination per occurrence and annual aggregate per Named Insured with $500,000 annual aggregate for all Named Insureds per Declaration. Coverage shall not attach or become insurance upon any property which at the time of loss is more specifically described and covered under any other policy form until the liability of such other insurance has first been exhausted and shall then cover only the excess of value of such property over and above the amount payable under such other insurance, whether collectible or not.
$	1,000,000	Unscheduled infrastructure including but not limited to tunnels, bridges, dams, catwalks (except those not for public use), roadways, highways, streets, sidewalks, culverts, channels, levees, dikes, berms, embankments, landfills (as more fully defined in the policy), docks, piers, wharves, street lights, traffic signals, meters, roadway or highway fencing (including guardrails), and all similar property unless a specific value has been declared. Unscheduled infrastructure coverage is excluded for the peril of Earthquake Shock and excluded for Federal Emergency Management Agency (FEMA) and/or Office of Emergency Services (OES) declared disasters, providing said declaration provides funding for repairs.
$	50,000,000	Increased Cost of Construction due to the enforcement of building codes/ ordinance or law (includes All Risk and Boiler & Machinery) except $2,500,000 for vacant properties.
$	25,000,000	Transit - Physical Damage only.
$	2,500,000	Unscheduled Animals; not to exceed $50,000 per Animal, per Occurrence.
$	2,500,000	Unscheduled Watercraft up to 27 feet.
	Not Covered	Per Occurrence for Off Premises Vehicle Physical Damage.
$	25,000,000	Off Premises Services Interruption including Extra Expense resulting from a covered peril at non-owned/operated locations.
$	5,000,000	Per Occurrence Per Named Insured subject to an Annual Aggregate of $10,000,000 for Earthquake Shock on Licensed Vehicles, Unlicensed Vehicles, Contractor's Equipment and Fine Arts combined for all Named Insured(s) in this Declaration combined that do not purchase optional dedicated Earthquake Shock coverage, and/or where specific values for such items are not covered for optional dedicated Earthquake Shock coverage as part of the Named Insured's schedule of values held on file with Alliant Insurance Services, Inc..

ALL RISK COVERAGES & SUB-LIMITS: (continued)	$	5,000,000	Per Occurrence Per Named Insured subject to an Annual Aggregate of $10,000,000 for Flood on Licensed Vehicles, Unlicensed Vehicles, Contractor's Equipment and Fine Arts combined for all Named Insured(s) in this Declaration combined that do not purchase optional dedicated Flood coverage, and/or where specific values for such items are not covered for optional dedicated Flood coverage as part of the Named Insured's schedule of values held on file with Alliant Insurance Services, Inc..
	$	3,000,000	Contingent Business Interruption, Contingent Extra Expense, Contingent Rental Values and Contingent Tuition Income separately.
	$	3,000,000	Tax Revenue Interruption – Per Policy Provisions. However, if specific values for such coverage have not been reported as part of the Named Insured's schedule of values held on file with Alliant Insurance Services, Inc., this sub-limit amount is limited to $1,000,000 Per Occurrence – Per Policy Provisions.
	$	500,000	Jewelry, Furs, Precious Metals and Precious Stones Separately.
	$	1,500,000	Claims Preparation Expenses.
	$	50,000,000	Expediting Expenses.
	$	100,000	Per Occurrence with a $1,000,000 Annual Aggregate per Declaration for Mold/Fungus Resultant Damage as more fully defined in the policy.
	$	100,000,000	Ingress/Egress Per Occurrence, Per Named Insured for the actual loss sustained during the period of time not exceeding 30 days when, as a direct result of physical loss or damage caused by a covered peril(s) specified by this Policy and occurring at property located within a 10 mile radius of covered property, ingress to or egress from the covered property by this Policy is prevented.
	$	100,000,000	Interruption By Civil Authority Per Occurrence, Per Named Insured for the actual loss sustained during the period of time not exceeding 30 days when, as a direct result of physical loss or damage caused by a covered peril(s) specified by this Policy and occurring at property located within a 10 mile radius of covered property, access to the covered property is specifically prohibited by order of a civil authority.
	$	10,000,000	Electronic Data Processing Media.
	$	1,000,000	Personal Property Outside of the USA (including associated Business Interruption).
	$	5,000,000	Per Occurrence Per Declaration Upgrade to Green Coverage subject to the lesser of, the cost of upgrade, an additional 25% of the applicable limit of liability shown in the schedule of values or this sub limit.
		Not Covered	for Communicable Disease.

$ 100,000	Per Occurrence while in Storage and In Transit coverage subject to $10,000 Deductible for Unmanned Aircraft as more fully defined in the Policy. Not Covered while in Flight.
See Policy Provisions	Scheduled Vacant Building per Conditions in Section IV., Item I
$ 2,500,000	Unscheduled Vacant Building per Policy Provisions Section IV., Item I

VALUATION:

- Repair or Replacement Cost (RCV)
- Actual Loss Sustained for Time Element Coverages
- Contractor's Equipment /Vehicles either Replacement Cost (RCV) or Actual Cash Value (ACV) as declared by each insured. If not declared, valuation will default to Actual Cash Value (ACV)

EXCLUSIONS (Including but not limited to):

- Seepage & Contamination - *unless otherwise provided by the Pollution Liability Coverage per the Summary attached. If, insured purchases such coverage.*
- Cost of Clean-up for Pollution - *unless otherwise provided by the Pollution Liability Coverage per the Summary attached. If, insured purchases such coverage.*
- *Mold - as more fully described in the Master Policy Wording or otherwise provided when Pollution Liability Coverage is purchased, and as defined in the coverage Summary.*

Deductibles: If two or more deductible amounts provided in the Declaration Page apply for a single occurrence the total to be deducted shall not exceed the largest per occurrence deductible amount applicable. (The Deductible amounts set forth below apply Per Occurrence unless indicated otherwise).

"ALL RISK" DEDUCTIBLE:	$ 250,000	Per Occurrence, which will apply in the event a more specific deductible is not applicable to a loss.
DEDUCTIBLES FOR SPECIFIC PERILS AND COVERAGES:	$ 250,000	All Flood Zones Per Occurrence excluding Flood Zones A & V.
	Not Covered	Per Occurrence for Flood Zones A & V (inclusive of all 100 year exposures).
	Not Applicable	for losses to locations in Tier 1 and/or 2 Counties and resulting from a Named Windstorm.
	Not Covered	Earthquake Shock: If the stated deductible is a flat dollar amount, the deductible will apply on a Per Occurrence basis, unless otherwise stated. If the stated deductible is on a percentage basis, the deductible will apply Per Occurrence on a Per Unit basis, as defined in the policy form, subject to the minimum deductible per occurrence.
	$ 1,000	Per Occurrence for Specially Trained Animals.

$	500,000	or the All Risk Basic Deductible, whichever is greater, for Unscheduled infrastructure including but not limited to tunnels, bridges, dams, catwalks (except those not for public use), roadways, highways, streets, sidewalks, culverts, channels, levees, dikes, berms, embankments, landfills (as more fully defined in the policy), docks, piers, wharves, street lights, traffic signals, meters, roadway or highway fencing (including guardrails), and all similar property unless a specific value has been declared. Unscheduled infrastructure coverage is excluded for the peril of Earthquake Shock and excluded for Federal Emergency Management Agency (FEMA) and/or Office of Emergency Services (OES) declared disasters, providing said declaration provides funding for repairs.
$	10,000	Per Vehicle or Item for Licensed Vehicles, Unlicensed Vehicles and Contractor's Equipment subject to $100,000 Maximum Per Occurrence, Per Named Insured for the peril of Earthquake Shock for Named Insured(s) who do not purchase dedicated Earthquake Shock limits.
$	50,000	Per Occurrence Per Named Insured for this Declaration for Fine Arts for the peril of Earthquake Shock for Named Insured(s) who do not purchase dedicated Earthquake Shock limits.
$	10,000	Per Vehicle or Item for Licensed Vehicles, Unlicensed Vehicles and Contractor's Equipment subject to $100,000 Maximum Per Occurrence, Per Named Insured for the peril of Flood for Named Insured(s) who do not purchase dedicated Flood limits.
$	50,000	Per Occurrence Per Named Insured for this Declaration for Fine Arts for the peril of Flood for Named Insured(s) who do not purchase dedicated Flood limits.
	2.5%	of Annual Tax Revenue Value per location for Tax Revenue Interruption.
	Not Covered	Per Occurrence for Off Premises Vehicle Physical Damage. If Off-Premises coverage is included/purchased, the stated deductible will apply to vehicle physical damage both on and off-premises on a Per Occurrence basis, unless otherwise stated. If Off-Premises coverage is not included, On-Premises/In-Yard coverage is subject to the All Risk (Basic) deductible.
	Not Covered	Per Occurrence for Contractor's Equipment.

Time Qualifiers

24 Hour	Waiting Period for Ingress/Egress, per Occurrence, as further defined in the Policy Form.
24 Hour	Waiting Period for interruption by Civil Authority, per Occurrence, as further defined in the Policy Form.
24 Hour	Waiting Period for Off Premises Service Interruption per Occurrence, as further defined in the Policy Form.

SPECIAL TERMS AND CONDITIONS:

It is understood and agreed that notwithstanding anything contained herein to the contrary the following shall apply to this Policy:

SPECIAL TERMS 1: Not Applicable

Not Applicable	Special Terms Limit
Not Applicable	Special Terms Deductible

The following stand-alone coverages are provided by the APIP program but are not covered in the Limit of Liability or the Sub-Limits of Liability above or attached to the Master Policy Form Wording. Carriers providing these coverages are included in the Schedule of Carriers.

$	100,000,000	Per Named Insured Per Occurrence subject to $200,000,000 Annual Aggregate of Declarations 1-14, 18-30 and 32-35 combined as respects Property Damage, Business Interruption, Rental Income and Extra Expense Combined for Terrorism (Primary Layer).
$	250,000	Per Occurrence Deductible for Primary Terrorism.
$	1,000,000,000	Per Named Insured for Terrorism (Excess Layer) subject to;
$	1,500,000,000	Per Occurrence, All Named Insureds combined in Declarations 1-14, 18-21, 23-30 and 32-35 for Terrorism (Excess Layer) subject to;
$	2,000,000,000	Annual Aggregate shared by all Named Insureds combined in Declarations 1-14, 18-21, 23-30 and 32-35, as respects Property Damage, Business Interruption, Rental Income and Extra Expense combined for Terrorism (Excess Layer).
$	500,000	Per Occurrence Deductible for Excess Terrorism (Applies only if the Primary Terrorism Limit is exhausted).
	Included	Information Security & Privacy Insurance with Electronic Media Liability Coverage. See attached Cyber Coverage Document for applicable Limits. (Cyber Liability) If, insured purchases such coverage.
$	25,000,000	Per Named Insured, Per occurrence subject to an Annual Aggregate of $50,000,000 combined for Declarations 1-14, 18-30 and 32-35 as respects Personal and Real property for Cyber Attack Resultant Damage.
	Included	Pollution Liability Insurance Coverage. See attached Pollution Liability Insurance Coverage Document for applicable limits and deductibles. If, insured purchases such coverage.

TERMS & CONDITIONS: 25% Minimum Earned Premium and cancellations subject to 10% penalty

Except Cyber Liability Premium is calculated on a pro-rata basis, unless there is a claim in which case the premium is deemed fully earned. If, insured purchases such coverage.

Except Pollution Liability Premium is 100% Earned at Inception

NOTICE OF CANCELLATION:	90 days except 10 days for non-payment of premium
BROKER:	**ALLIANT INSURANCE SERVICES, INC.** **License No. 0C36861** David Evans Senior Vice President Daniel Howell JD, CPCU, ARM-P, Senior Executive Vice President, Managing Director, Specialty Fred Godfrey Account Executive

Notes:

- ***Coverage outlined in this Evidence Attachment is subject to the terms and conditions set forth in the policy. Please refer to policy for specific terms, conditions and exclusions.***
- ***The flood zones provided on the Schedule of Values (SOVs) are for rating purposes only. The actual flood zone will be determined at the time of loss.***
- ***Change in Total Insurable Values will result in adjustment in premium.***
- ***Please refer to invoice for new lockbox remittance for address and account information.***

APIP Summary of Bound Property Changes

Below is a summary of Bound changes for the 2025-2026 policy period

Coverage	2024-2025	2025-2026	Status
Available Program All Risk Limits up to:	$1,000,000,000	$1,250,000,000	With Underwriting Approval
Available Program Boiler & Machinery Limits up to:	$100,000,000	$200,000,000	With Underwriting Approval
Extra Expense Sub-limit	$50,000,000	$75,000,000	Enhancement
Property sub-limit & deductible: Unscheduled infrastructure	Sub-limit $750,000 Unscheduled infrastructure Deductible: $500,000	Sub-limit $1.000.000 Unscheduled infrastructure Deductible: $500,000 or basic deductible whichever is higher.	Enhancement
Miscellaneous Unnamed Locations Sub-limit	Per Bound TIV $10,000,000 Miscellaneous Unnamed Locations for Named Insureds, with total insurable values greater than or equal to $250,000,000 at time of binding or $5,000,000 Miscellaneous Unnamed Locations for Named Insureds with total insurable values less than $250,000,000 at time of binding excluding Earthquake coverage for Alaska and California locations. If Flood coverage is purchased for scheduled locations, this extension will extend to include Flood coverage for any location not situated in Flood Zones A or V.	$10,000,000 Miscellaneous Unnamed Locations for Named Insureds, excluding Earthquake coverage for Alaska and California locations. If Flood coverage is purchased for scheduled locations, this extension will extend to include Flood coverage for any location not situated in Flood Zones A or V.	Enhancement
Claims Preparation Sub-limit	$1,000,000	$1,500,000	Enhancement
Tax Interruption Sub-limit	2.5% of Annual Tax Revenue Value per Location for Tax Interruption.	2.5% of Annual Tax Revenue Value per Location for Tax Revenue Interruption.	Clarification
Waiting Periods	24 Hour waiting periods	Added sub-section with new header identifying 24 hour waiting periods as "Time Qualifiers"	Clarification
Service Interruption	24 Hour Waiting Period for Service Interruption for All Perils and Coverages.	24 Hour Waiting Period for Off Premises Service Interruption per Occurrence, as further defined in the Policy Form	Clarification
Ingress/Egress	24 Hour Waiting Period for Ingress/Egress	24 Hour Waiting Period for Ingress/Egress per Occurrence, as further defined in the Policy Form	Clarification
Civil Authority	24 Hour Waiting Period for Civil Authority	24 Hour Waiting Period for interruption by Civil Authority, per Occurrence, as further defined in the Policy Form	Clarification

COVERAGE AND SUB-LIMIT BOUND CHANGES CONTINUED			
Coverage	**2024-2025**	**2025-2026**	**Status**
Earthquake Reference	Earthquake	Earthquake Shock	Clarification
Excess Terrorism Limits	$600,000,000 per insured / $1,100,000,000 per occurrence / $1,400,000,000 annual aggregate	$1,000,000,000 per insured / $1,500,000,000 per occurrence / $2,000,000,000 annual aggregate	Enhancement
MASTER POLICY FORM BOUND CHANGES			
Coverage	**2024-2025**	**2025-2026**	**Status**
Policy Period	July 1, 2024 to July 1,2025	July 1, 2025 to July 1,2026	Update
USA Form No.	20	21	Update
Section I, A. Insuring Agreement	In consideration of the premium paid by the Named Insured to the Company, the Company agrees to insure the following per the terms and conditions herein.	In consideration of the premium paid by the Named Insured to the Company, the program carriers agree to insure the following per the terms and conditions herein, including all carrier endorsements, thereto.	Clarification
Section I E 2.n Sub-limits	n. Unscheduled infrastructure .. Unscheduled Infrastructure coverage is excluded for the peril of Earthquake Shock, and for Federal Emergency Management Agency (F.E.M.A.) and/or any State Office of Emergency Services (O.E.S.) declared disasters, providing said declaration provides funding for repairs.	Unscheduled Infrastructure coverage is excluded for the peril of Earthquake Shock and excluded for Federal Emergency Management Agency (F.E.M.A.) and/or any State Office of Emergency Services (O.E.S.) declared disasters, providing said declaration provides funding for repairs.	Clarification
Section I, H. Unit of Insurance Defined	H. Unit of Insurance Defined	H. Percentage Deductibles – Unit(s) of Insurance Defined When the applicable deductible is on a unit(s) of insurance basis, subject to any applicable minimum deductible(s) the amount of the deductible shall be determined by applying the percentages separately to each of the following units of insurance:	Clarification
Tax Interruption	Where Tax Interruption is referenced	Revised to read: Tax Revenue Interruption	Clarification
Section II, B. 6. Claim Preparation Expenses	This Policy also insures as a direct result of physical loss or damage insured hereunder any claim preparation expenses including, but not limited to, auditors, consultants and accountants. However, the expenses of public adjusters are specifically excluded	This Policy also insures as a direct result of physical loss or damage insured hereunder solely to any claim preparation expenses including, but not limited to, auditors, consultants and accountants. However, the expenses of public adjusters, or the expenses of any party associated with prosecuting a claim for coverage under this policy, are specifically excluded.	Clarification
Section II, D. 6. Library Contents	Expiring values	Values inflated by 2024; 4th quarter rate of 3.5%	Update

MASTER POLICY FORM BOUND CHANGES CONTINUED			
Coverage	**2024-2025**	**2025-2026**	**Status**
Section IV, I. 1. Definition of Vacant	However, the above definition of vacant, shall not apply when customary business operations at a building are temporarily suspended due to circumstances that are usual to such business operations, provided only that existing building safeguards as described in part J. Protective Safeguards are operational during the period of temporary suspension.	However, the above definition of vacant, shall not apply when customary business operations at a building are temporarily suspended due to circumstances that are usual to such business operations, provided only that existing building safeguards as described in part J. Protective Safeguards are operational during the period of temporary suspension.	Clarification
Section IV, I. 4. Other Vacancy Conditions	a the maximum amount recoverable shall not be more than 120% of the amount reported on the schedule of values held on file with Alliant Insurance Services, Inc. for that building.	a the maximum amount recoverable shall not be more than the amount reported on the schedule of values held on file with Alliant Insurance Services, Inc. for that building.	Clarification
Section IV, J. Protective Safeguards	The Named Insured shall exercise due diligence in maintaining in complete working order all protective safeguard equipment and services.	The Named Insured shall exercise due diligence in maintaining in complete working order all protective safeguard equipment and services, including but not limited to fire alarms, fire sprinklers, utility service, and security alarm systems.	Clarification
Section IV, AI. Reporting Conditions	Mid-term transactions will only be processed for addition or deletion of values that are in excess of USD25,000,000 for Named Insureds with total insurable values greater than or equal to USD500,000,000 at time of binding or USD10,000,000 for Named Insureds with total insurable values less than USD500,00,000 at time of binding.	Mid-term transactions will only be processed for addition or deletion of values that are in excess of USD25,000,000	Enhancement
Endorsement		Endorsement 7 Pollution, Contamination, Debris Removal Exclusion	Clarification
Endorsement	Upgrade to Green endorsement 7	Upgrade to Green endorsement 8	Update

ALLIANT INSURANCE SERVICES, INC.
ALLIANT PROPERTY INSURANCE PROGRAM (APIP)
BOILER & MACHINERY EVIDENCE ATTACHMENT

NAMED INSURED:	UC College of the Law, San Francisco
DECLARATION:	28-Education 1
POLICY PERIOD:	July 1, 2025 to July 1, 2026
REFERENCE NUMBER:	APIP2025 (Dec 28)
COMPANIES:	See Attached List of Companies
TOTAL INSURED VALUES:	$ 471,433,669 as of June 30, 2025

COVERAGES & LIMITS:

$	200,000,000	Boiler Explosion and Machinery Breakdown, (for those Named Insureds that purchase this optional dedicated coverage) as respects Combined Property Damage and Business Interruption/Extra Expense (Including Bond Revenue Interest Payments where Values Reported and excluding Business Interruption for power generating facilities unless otherwise specified). Limit includes loss adjustment agreement and electronic computer or electronic data processing equipment with the following sub-limits:
	Included	Jurisdictional and Inspections.
$	10,000,000	Per Occurrence for Service/Utility/Off Premises Power Interruption.
	Included	Per Occurrence for Consequential Damage/Perishable Goods/Spoilage.
$	10,000,000	Per Occurrence for Electronic Data Processing Media and Data Restoration.
$	2,000,000	Per Occurrence, Per Named Insured and in the Annual Aggregate per Declaration for Earthquake Resultant Damage for Named Insureds who purchase Dedicated Earthquake Shock Coverage.
$	10,000,000	Per Occurrence for Hazardous Substances / Pollutants / Decontamination.
	Included	Per Occurrence for Machine or Apparatus used for Research, Diagnosis, Medication, Surgical, Therapeutic, Dental or Pathological Purposes.

NEWLY ACQUIRED LOCATIONS:

$	25,000,000	Automatic Acquisition for Boiler & Machinery values at newly acquired locations. Values greater than 25,000,000 or Power Generating Facilities must be reported within 120 days and must have prior underwriting approval prior to binding

VALUATION:	Repair or Replacement except Actual Loss sustained for all Time Element coverages
EXCLUSIONS (Including but not limited to):	• Testing • Explosion, except for steam or centrifugal explosion • Explosion of gas or unconsumed fuel from furnace of the boiler
OBJECTS EXCLUDED: (Including but not limited to):	• Insulating or refractory material • Buried Vessels or Piping
NOTICE OF CANCELLATION:	90 days except 10 days for non-payment of premium
DEDUCTIBLES:	$ 250,000 Except as shown for Specific Objects or Perils. $ 250,000 Electronic Data Processing Media. $ 250,000 Consequential Damage. $ 250,000 Objects over 200 hp, 1,000 KW/KVA/Amps or Boilers over 5,000 square feet of heating surface. $ 250,000 Objects over 350 hp, 2,500 KW/KVA/Amps or Boilers over 10,000 square feet of heating surface. $ 250,000 Objects over 500 hp, 5,000 KW/KVA/Amps or Boilers over 25,000 square feet of heating surface. $ 250,000 Objects over 750 hp, 10,000 KW/KVA/Amps or Boilers over 75,000 square feet of heating surface. $ 350,000 Objects over 25,000 hp, 25,000 KW/KVA/Amps or Boilers over 250,000 square feet of heating surface. 10 per foot / $2,500 Minimum Deep Water Wells. 24 Hours Business Interruption/Extra Expense Except as noted below. 30 Days Business Interruption - Revenue Bond. 24 Hour Waiting Period Utility Interruption. 5 x 100% of Daily Value Business Interruption - All objects over 750 hp or 10,000 KW/KVA/Amps or 10,000 square feet heating surface. 5 x 100% of Daily Value Business interruption - All Objects at Waste Water Treatment Facilities and All Utilities.

BROKER:

ALLIANT INSURANCE SERVICES, INC.
License No. 0C36861

David Evans
Senior Vice President

Daniel Howell
JD, CPCU, ARM-P, Senior Executive Vice President, Managing Director, Specialty

Fred Godfrey
Account Executive

Notes:

- ***Coverage outlined in this Evidence Attachment is subject to the terms and conditions set forth in the policy. Please refer to policy for specific terms, conditions and exclusions.***
- ***Change in Total Insurable Values will result in adjustment in premium.***

ALLIANT INSURANCE SERVICES, INC.
ALLIANT PROPERTY INSURANCE PROGRAM (APIP)
CYBER INSURANCE EVIDENCE ATTACHMENT
CORE COVERAGE

TYPE OF COVERAGE: Information Security & Privacy Insurance with Electronic Media Liability Coverage

PROGRAM: **Alliant Property Insurance Program (APIP) inclusive of Public Entity Property Insurance Program (PEPIP), and Hospital All Risk Property Program (HARPP), and Special Property Insurance Program (SPIP)**

NAMED INSURED:

APIP Cyber and Pollution Programs, Inc. which may include any member(s), entity(ies), agency(ies), organization(s), enterprise(s) and/or individual(s), attaching to each Declaration insured under the ALLIANT PROPERTY INSURANCE PROGRAM (APIP), inclusive of PUBLIC ENTITY PROPERTY INSURANCE PROGRAM (PEPIP) and HOSPITAL ALL RISK PROPERTY PROGRAM (HARPP) and SPECIAL PROPERTY INSURANCE PROGRAM (SPIP) as their respective rights and interests may appear which now exist or which hereafter may be created or acquired and which are owned, financially controlled or actively managed by the herein named interest, all jointly, severally or in any combination of their interests, for account of whom it may concern (all hereinafter referred to as Member(s) / Entity(ies)).

DECLARATION: Various Declarations as on file with Insurer

POLICY PERIOD: July 1, 2025 to July 1, 2026

POLICY #: FN2505500

TERRITORY: WORLD-WIDE

RETROACTIVE DATE: **APIP/PEPIP**

For new members – the retro active date will be the date of addition

July 1, 2025 For new members included on the July 1, 2025/26 policy

July 1, 2024 For new members included on the July 1, 2024/25 policy

July 1, 2023 For new members included on the July 1, 2023/24 policy

July 1, 2022 For new members included on the July 1, 2022/23 policy

July 1, 2021 For new members included on the July 1, 2021/22 policy

July 1, 2020 For new members included on the July 1, 2020/21policy

July 1, 2019 For new members included on the July 1, 2019/20 policy

July 1, 2018 For new members included on the July 1, 2018/19 policy

July 1, 2017 For new members included on the July 1, 2017/18 policy

July 1, 2016 For new members included on the July 1, 2016/17 policy

July 1, 2015 For new members included on the July 1, 2015/16 policy

July 1, 2014 For new members included on the July 1, 2014/15 policy

July 1, 2013 For new members included on the July 1, 2013/14 policy

July 1, 2012 For new members included on the July 1, 2012/13 policy

INSURER:	Lloyd's of London - Beazley Syndicate: Syndicates 2623 - 623 - 100% Liberty Surplus Insurance Corporation (Ironshore) Associated Industries Insurance Company, Inc. (AmTrust Financial) Westchester Surplus Lines Insurance Company (Chubb) 100% MRS 457 at Lloyd's (Munich RE)			
COVERAGES & LIMITS:	**Ai.**	$	75,000,000	**Annual Policy and Program Aggregate Limit of Liability** (subject to policy exclusions) for all Insureds/Members combined (Aggregate for all coverages combined, including Claims Expenses), subject to the following limits and sub-limits as noted.
	Aii.	$	2,000,000	**Insured/Member Annual Aggregate Limit of Liability** (subject to policy exclusions) for each Insured/Member, **within** the Annual Policy and Program Aggregate Limit of Liability (Aggregate for all coverages combined, including Claim Expenses) subject to the following limits and sub-limits as noted.
BREACH RESPONSE				
Breach Response Costs:		$	500,000	**Aggregate Limit of Liability** for each Insured/Member (Limit is increased to $1,000,000 if Beazley Nominated Services Providers are used)
FIRST PARTY LOSS				
Business Interruption and Dependent Business Interruption Aggregate Sublimit		$	750,000	**Aggregate Limit of Liability** for each Insured/Member
Business Interruption Loss Resulting from Security Breach:		$	750,000	**Aggregate Limit of Liability** for each Insured/Member (Within the $750,000 Business Interruption and Dependent Business Interruption Aggregate Sublimit)
Business Interruption Loss Resulting from System Failure:		$	500,000	**Aggregate Limit of Liability** for each Insured/Member (Within the $750,000 Business Interruption and Dependent Business Interruption Aggregate Sublimit)
Dependent Business Loss Resulting from Security Breach:		$	750,000	**Aggregate Limit of Liability** for each Insured/Member (Within the $750,000 Business Interruption and Dependent Business Interruption Aggregate Sublimit)
Dependent Business Loss Resulting from System Failure:		$	100,000	**Aggregate Limit of Liability** for each Insured/Member (Within the $750,000 Business Interruption and Dependent Business Interruption Aggregate Sublimit)
Cyber Extortion Loss:		$	750,000	**Aggregate Limit of Liability** for each Insured/Member
Data Recovery Costs:		$	750,000	**Aggregate Limit of Liability** for each Insured/Member

Data & Network Liability:	$	2,000,000	**Aggregate Limit of Liability** for each Insured/Member for all Damages and Claims Expenses
Regulatory Defense & Penalties:	$	2,000,000	**Aggregate Limit of Liability** for each Insured/Member for all Penalties and Claims Expenses
Payment Card Liabilities & Costs:	$	2,000,000	**Aggregate Limit of Liability** for each Insured/Member for all PCI Fines, Expenses and Costs
Media Liability:	$	2,000,000	**Aggregate Limit of Liability** for each Insured/Member for all Damages and Claims Expenses
eCRIME			
Fraudulent Instruction:	$	75,000	**Aggregate Limit of Liability** for each Insured/Member
Funds Transfer Fraud:	$	75,000	**Aggregate Limit of Liability** for each Insured/Member
Telephone Fraud:	$	75,000	**Aggregate Limit of Liability** for each Insured/Member
CRIMINAL REWARD			
Criminal Reward:	$	25,000	**Aggregate Limit of Liability** for each Insured/Member
COVERAGE ENDORSEMENT(S)			
Reputation Loss:	$	200,000	**Aggregate Limit of Liability** for each Insured/Member
Claims Preparation Costs for Reputation Loss Claims Only:	$	50,000	**Aggregate Limit of Liability** for each Insured/Member
Computer Hardware Replacement Costs:	$	200,000	**Aggregate Limit of Liability** for each Insured/Member
Invoice Manipulation:	$	100,000	**Aggregate Limit of Liability** for each Insured/Member
Cryptojacking:	$	50,000	**Aggregate Limit of Liability** for each Insured/Member

RETENTION:	$	50,000	Per Incident, Claim, or Loss for each Member/Insured with Total Insured Value (TIV) up to $250,000,000 at the time of policy inception
		8	Hour waiting period for Dependent/Business Interruption Loss
	$	100,000	Per Incident, Claim, or Loss for each Member/Insured with Total Insured Value (TIV) greater than $250,000,000 and up to $750,000,000 at the time of policy inception
		8	Hour waiting period for Dependent/Business Interruption Loss
	$	250,000	Per Incident, Claim, or Loss for each Member/Insured with Total Insured Value (TIV) greater than $750,000,000 at the time of policy inception
		8	Hour waiting period for Dependent/Business Interruption Loss

NOTICES:

Policy coverage of this policy provides coverage on a claims made and reported basis; except as otherwise provided, coverage under noted coverage schedule applies only to claims first made against the Insured/Member and reported to underwriters during the policy period. Claims expenses shall reduce the applicable limit of liability and are subject to the applicable retention.

This is a shared limit policy among the Named Insureds. The per Insured/Member policy limits are on a per Insured/Member basis. Sub-limits listed are aggregated per Insured/Member and are within the total Insured/Member aggregate limit. In the event of a claim/incident with multiple Insureds/Members exhausting the program aggregate limit provided by the Insurer to Insureds/Members, payment to all Insureds/Members for the claim/incident will be determined by the Insurer. Where coverages are aggregated, sub-limit and limits apply to all Insureds/Members for the entire Policy Period unless specifically stated otherwise. The policy aggregate limit is not a per Insured/Member maximum limit.

EXTENDED REPORTING PERIOD:

For Named Insured - To be determined at the time of election (additional premium will apply)

SPECIFIC COVERAGE PROVISIONS:

A. **Breach Response** indemnifies the Insured Organization for Breach Response Costs incurred by the Insured Organization because of an actual or reasonably suspected Data Breach or Security Breach that the Insured first discovers during the Policy Period.

B. First Party Loss

Business Interruption Loss indemnifies the Insured Organization for a Business Interruption Loss sustained as a result of a Security Breach or System Failure that the Insured first discovers during the Policy Period.

Dependent Business Interruption Loss indemnifies the Insured Organization for a Dependent Business Interruption Loss sustained as a result of a Dependent Security Breach or a Dependent System Failure that the Insured first discovers during the Policy Period.

Cyber Extortion Loss indemnifies the Insured Organization for a Cyber Extortion Loss incurred as a result of an Extortion Threat first made against the Insured Organization during the Policy Period.

Data Recovery Costs indemnifies the Insured Organization for Data Recovery Costs incurred as a direct result of a Security Breach that the Insured first discovers during the Policy Period.

C. Liability

Data & Network Liability pays Damages and Claims Expenses, which the Insured is legally obligated to pay because of any Claim first made against any Insured during the Policy Period for a Data Breach, a Security Breach, the Insured's failure to timely disclose a Data Breach or Security Breach, or failure of the Insured to comply with the part of a Privacy Policy that specifically:
(a) prohibits or restricts the Insured Organization's disclosure, sharing or selling of Personally Identifiable Information; (b) requires the Insured Organization to provide an individual access to Personally Identifiable Information or to correct incomplete or inaccurate Personally Identifiable Information after a request is made; or (c) mandates procedures and requirements to prevent the loss of Personally Identifiable Information;

Regulatory Defense & Penalties pays Penalties and Claims Expenses, which the Insured is legally obligated to pay because of a Regulatory Proceeding first made against any Insured during the Policy Period for a Data Breach or a Security Breach.

Payment Card Liabilities & Costs indemnifies the Insured Organization for PCI Fines, Expenses and Costs which it is legally obligated to pay because of a Claim first made against any Insured during the Policy Period.

Media Liability pays Damages and Claims Expenses, which the Insured is legally obligated to pay because of any Claim first made against any Insured during the Policy Period for electronic Media Liability.

D. **eCrime** indemnifies the Insured/Member for any direct financial loss sustained resulting from:

- *Fraudulent Instruction*
- *Funds Transfer Fraud*
- *Telephone Fraud*

That the Insured first discovers during the Policy Period.

E. **Criminal Reward** indemnifies the Insured/Member for Criminal Reward Funds.

Coverage Endorsement(s)

Reputational Loss indemnifies the Insured Organization for Reputation Loss that the Insured Organization sustains solely as a result of an Adverse Media Event that occurs during the Policy Period, concerning: a Data Breach, Security Breach, or Extortion Threat that the Insured first discovers during the Policy Period; or if this policy is a Renewal, a Data Breach, Security Breach, or Extortion Threat that the Insured first discovers during the last 90 days of the prior policy period.

Computer Hardware Replacement Costs is part of the Extra Expense coverage. Extra Expense means reasonable and necessary expenses incurred by the Insured Organization during the Period of Restoration to minimize, reduce or avoid Income Loss, over and above those expenses the Insured Organization would have incurred had no Security Breach, System Failure, Dependent Security Breach or Dependent System Failure occurred; and includes reasonable and necessary expenses incurred by the Insured Organization to replace computers or any associated devices or equipment operated by, and either owned by or leased to, the Insured Organization that are unable to function as intended due to corruption or destruction of software or firmware directly resulting from a Security Breach

Invoice Manipulation indemnifies the Insured Organization for Direct Net Loss resulting directly from the Insured Organization's inability to collect Payment for any goods, products or services after such goods, products or services have been transferred to a third party, as a result of Invoice Manipulation that the Insured first discovers during the Policy Period. Invoice Manipulation means the release or distribution of any fraudulent invoice or fraudulent payment instruction to a third party as a direct result of a Security Breach or a Data Breach.

Cryptojacking indemnifies the Insured Organization for any direct financial loss sustained resulting from Cryptojacking that the Insured first discovers during the Policy Period. Cryptojacking means the Unauthorized Access or Use of Computer Systems to mine for Digital Currency that directly results in additional costs incurred by the Insured Organization for electricity, natural gas, oil, or internet.

EXCLUSIONS:
(Including but not limited to)

Coverage does not apply to any claim or loss from:

- Bodily Injury or Property Damage
- Trade Practices and Antitrust
- Gathering or Distribution of Information
- Prior Known Acts & Prior Noticed Claims
- Racketeering, Benefit Plans, Employment Liability & Discrimination
- Sale or Ownership of Securities & Violation of Securities Laws
- Criminal, Intentional of Fraudulent Acts
- Patent, Software Copyright, Misappropriation of Information
- Governmental Actions
- Other Insureds & Related Enterprises
- Trading Losses, Loss of Money & Discounts
- Media-Related Exposures – Contractual liability or obligation
- Nuclear Incident Exclusion Clause
- Radioactive Contamination Exclusion Clause
- Tribal Exclusion Endorsement
- Sanctions Limitation
- War and Cyber War Exclusion with Single Entity Carve Back
- Asbestos, Pollution and Contamination Exclusion Endorsement
- First Party Loss – with respects: 1. seizure, nationalization, confiscation, or destruction of property or data by official order of any governmental or public authority; 2. costs or expenses incurred by the Insured to identify or remediate software program errors or vulnerabilities or update, replace, restore, assemble, reproduce, recollect or enhance data or Computer Systems to a level beyond that which existed prior to a Security Breach, System Failure, Dependent Security Breach, Dependent System Failure or Extortion Threat; but solely with respect to Business Interruption Loss, this exclusion will not apply to the extent that such costs or expenses are less than or equal to such costs or expenses incurred to restore the Computer System to the same or equivalent condition that existed immediately prior to a Security Breach or System Failure; 3. failure, interruption, or malfunction of Financial Market Infrastructure, Digital and Internet Infrastructure, power, water, oil, gas, electrical, sewage, or other utilities, or mechanical infrastructure or services, that are not under the Insured Organization's direct operational control; or 4. fire, flood, earthquake, volcanic eruption, explosion, lightning, wind, hail, tidal wave, landslide, act of God or other physical event.
- Website Tracking Exclusion specific to hospitals as defined by: Hospitals defined as institutions that comprise all the following: A health facility with overall administrative and professional responsibility and an organized medical staff that provides 24-Hour inpatient care, including the following services: Medical, nursing, surgical, anesthesia, laboratory, pharmacy, and dietary services.

NOTICE OF CLAIM:	• IMMEDIATE NOTICE must be made to Beazley NY of all potential claims and circumstances (assistance, and cooperation clause applies) • Claim notification under this policy is to: Beazley Group Attn: TMB Claims Group 45 Rockefeller Plaza, 16th Floor New York, NY 10111 bbr.claims@beazley.com Toll Free 24 Hour Hotline 866-567-8570

NOTICE OF CANCELLATION:	10 days for non-payment of premium
OTHER SERVICES	Unlimited Access to Beazley Breach Solutions website https://www.beazley.com/en-us/cyber-customer-centre/cyber/
BROKER:	ALLIANT INSURANCE SERVICES, INC. License No. 0C36861

NOTES:

- ***Coverage outlined in this Evidence Attachment is subject to the terms and conditions set forth in the policy***
- ***Please refer to Policy for specific terms, conditions and exclusions***

SUMMARY OF CYBER INSURANCE CHANGES

THE FOLLOWING ITEMS ARE BOUND CHANGES FOR THE 2025-2026 POLICY TERM

Coverage	2024-2025	2025-2026 Bound Changes
Beazley Breach Response Endorsement	Coverage offered to new and existing Members – Underwriting required	No changes
Retention Buy Down	Coverage is being offered to new and existing members; underwriting required	No changes
New members to APIP Cyber Core-Mid Term Transactions	New this year; no underwriting, all members requesting core coverage are eligible. Ransomware application, statement of no losses, and AFB warranty required.	All Members requesting core coverage are required to complete the Beazley Ransomware Supplemental in the application portal, along with a statement of no losses and a signed AFB Warranty.
Beazley Core Coverage-Website Tracking Exclusion	Website Pixel Tracking Exclusion specific to Hospitals defined as a Health Facility with overall administrative and professional responsibility and organized medical staff that provides 24-hour inpatient care, including the following services: Medical, nursing, surgical, anesthesia, laboratory, pharmacy, and dietary services	No changes.
Beazley Core Coverage-New Boost offering	By endorsement and included only with the BBR purchase. Open to all members. Provides full limit coverage for some First Party Limits; Business Interruption, Cyber Extortion, and Data Recovery	No Changes.
New To APIP Core effective Mid Term or 7/1.	Minimum Premium was $500	Minimum Premium Changed to $1,000
Beazley Breach Response Changes		No retention at time of loss for forensic services only when using Beazley Security; applicable to Beazley Breach Response Endorsement purchasers only.

ALLIANT INSURANCE SERVICES, INC.
ALLIANT PROPERTY INSURANCE PROGRAM (APIP)

POLLUTION LIABILITY EVIDENCE ATTACHMENT

TYPE OF INSURANCE: ☒ Insurance ☐ Reinsurance

TYPE OF COVERAGE: Claims Made and Reported Pollution Liability

PROGRAM: **Alliant Property Insurance Program (APIP)**

NAMED INSURED: Any member(s), entity(ies), agency(ies), organization(s), enterprise(s), pool(s), Joint Powers Authority(ies) and/or individual(s) attached to each Declaration insured as per Named Insured Schedule on file with Insurer, listed below.

POLICY PERIOD: July 1, 2025 to July 1, 2026

POLICY NUMBER: ISPILLSCAZ0U005

RETROACTIVE DATE: This coverage shall only apply if the Pollution Incident or Disinfection Event giving rise to the Claim, Loss, Business Interruption Expenses or Extra Expenses commenced, in its entirety, on or after July 1, 2011, or the date that the Insured first joined the Alliant Property Insurance Program (APIP) for environmental or pollution insurance coverage, whichever is later, except for the following coverages:

- July 1, 2021 for Products Pollution and Exposure Liability;
- July 1, 2021 for Contractor's Pollution
- July 1, 2021 for Mold Matter

COMPANY: Ironshore Specialty Insurance Company

A.M. BEST INSURANCE RATING:: A, Excellent, Financial Size Category XV
($2 Billion or greater)
Effective August 2, 2024

STANDARD & POORS RATING: A (Strong) as of May 19, 2024

ADMITTED STATUS: Non-Admitted in all states.

COVERED PROPERTY: Per the following Statements of Values (SOVs) submitted and on file with carrier:

1. PEPIP DEC 1 – SOVs
2. PEPIP DEC 2 – SOVs
3. PEPIP DEC 3 – SOVs
4. PEPIP DEC 4 – SOVs
5. PEPIP DEC 5 – SOVs
6. PEPIP DEC 11 – SOVs
7. PEPIP DEC 12 – SOVs
8. PEPIP DEC 14 – SOVs
9. PEPIP DEC 19 – SOVs
10. PEPIP DEC 23 – SOVs
11. PEPIP DEC 24 – SOVs
12. PEPIP DEC 26 – SOVs
13. PEPIP DEC 27 – SOVs
14. PEPIP DEC 28 – SOVs
15. PEPIP DEC 29 – SOVs
16. PEPIP DEC 30 – SOVs
17. PEPIP DEC 32 – SOVs
    (Excludes SPIP, except as endorsed)
18. PEPIP DEC 33 – SOVs
19. PEPIP DEC 34 – SOVs
20. PEPIP DEC 35 – SOVs
21. PEPIP DEC 96 – SOVs
    (Excluding HARPP members)

COVERED PROPERTY (Continued):

Covered locations are defined as any real property owned, leased, rented, operated or occupied by the Insured as of Policy Inception, including, but not limited to, any subsurface potable water, wastewater or storm water pipelines to or from a Covered Location provided that such pipelines are located within a one thousand (1,000) foot radius of such Covered Location. Also includes any roads including, but not limited to, any alleys, streets or bridges owned or operated by the Insured, any vacant land, including any parks, open spaces, easements or rights-of-way owned or operated by the Insured any location scheduled to this policy by endorsement.

COVERAGES & LIMITS:

$25,000,000	**Policy Program Aggregate (all insureds combined)**
$ 2,000,000	**Per Pollution Incident**
$ 2,000,000	**Per Named Insured Aggregate**
$ 2,000,000	**Per JPA/Pool Aggregate**

SUB-LIMITS:

$ 100,000	Disinfection Event Expenses Per Pollution Incident*
$ 100,000	Disinfection Event Expenses Program Aggregate*
$ 250,000	Image Restoration Expenses Per Pollution Incident*
$ 250,000	Image Restoration Expenses Program Aggregate*
$ 5,000,000	Mold Matter Loss, Business Interruption and Extra Expense Program Aggregate*
$ 1,000,000	Mold Matter Restoration Costs, Business Interruption Expenses and Extra Expenses Program Aggregate*
$ 3,000,000	Sewer Backup and Overcharge Program Aggregate*
$ 3,000,000	Lead or Lead Containing Materials Program Aggregate – All Claims*
$ 250,000	Any Punitive, Exemplary and Multiplied Damages and Civil Fines, Penalties and Assessments*
$ 2,000,000	Products Pollution and Exposure Liability Per Pollution Incident*
$ 5,000,000	Products Pollution and Exposure Liability Program Aggregate - Biosolids*
$10,000,000	Products Pollution and Exposure Liability Program Aggregate – Potable Water*
$ 1,000,000	Contractor's Pollution Per Pollution Incident - Herbicide, Insecticide, Pesticide Applications Only*
$ 2,000,000	Contractor's Pollution Program Aggregate - Herbicide, Insecticide, Pesticide Applications Only*
$ 2,000,000	Contractor's Pollution Per Pollution Incident - All other Operations*
$10,000,000	Contractors Pollution Program Aggregate* - All other Operations*
$ 5,000,000	Wildfire Program Aggregate Sublimit*

*Note: the above sub-limits payable under this coverage do not increase and are not in addition to the applicable limit of liability.

EXTENDED REPORTING PERIOD:

Automatic Extended Reporting Period

The Named Insured shall be entitled to an Automatic Extended Reporting Period for a period of ninety (90) days following the effective date of termination of this Policy for no additional premium. This automatic ERP does not apply if the insured has purchased other insurance to replace the insurance provided by this policy.

SPECIFIC COVERAGE PROVISIONS:

CLAIMS MADE AND REPORTED

Coverage A – Third Party Claims for Bodily Injury, Property Damage or Remediation Expenses:
Coverage for loss that the Insured becomes legally obligated to pay as a result of claims for Bodily Injury, Property Damage or Remediation Expenses directly resulting from a Pollution Incident, provided that the claim is first made against the Insured and reported to the Insurer, in writing, during the policy period.

Coverage B – Onsite First Party Remediation Expenses:
Coverage for Remediation Expenses incurred exclusively for remediation of pollutants that are on, at or under a covered location, provided that the pollution incident is first discovered by the Insured during the policy period, the Insured reports the pollution incident to the Insurer, in writing, during the policy period, and the pollution incident is promptly reported by the Insured to the appropriate governmental authority if and as required by environmental law.

Coverage C – Emergency Response Expenses:
To pay on behalf of the Insured, Emergency Response Expenses incurred by or on behalf of the Insured in response to an imminent and substantial threat to human health or the environment resulting from a Pollution Incident on, at , under or migrating from a Covered Property or arising from Transportation that commences, in its entirety, during the policy period. The Emergency Response Expenses must: (i) be incurred within seven (7) days of the commencement of such Pollution Incident; and (ii) be reported to the Insurer within fourteen (14) days of such commencement. For this Coverage to apply, the Pollution Incident giving rise to the Emergency Response Expenses must be unexpected and unintended from the standpoint of the Insured.

Coverage for Transportation is included in Emergency Response Expenses above.

Coverage D – Business Interruption:
Coverage for the Insured's Business Interruption Expenses and Extra Expenses during the Period of Interruption that directly result from a Pollution Incident on, at or under a Covered Property.
This Coverage shall apply only if the Pollution Incident giving rise to the Business Interruption Expenses or Extra Expenses is first discovered by the Insured and reported to the Insurer, in writing, during the Policy Period, and such Pollution Incident results in Remediation Expenses covered under this Policy. Discovery of a Pollution Incident happens when a Responsible Insured first becomes aware of the Pollution Incident. Further, if the interruption results from a Pollution Incident and any other cause(s), the Company shall only pay that portion of Business Interruption Expenses and Extra Expenses solely attributable to the Pollution Incident. In the event of a Period of Interruption, it is a condition precedent to Coverage that the Named Insured notifies the Company of the interruption within thirty (30) days of its commencement and that the Named Insured resume normal operation of the business as soon as possible and use all reasonable efforts to mitigate any Business Interruption Expenses and Extra Expenses.

Coverage E – Coverage for Disinfection Event Expenses
To pay on behalf of the Insured, Disinfection Expenses that directly result from a Disinfection Event at a Covered Property, provided that the Disinfection Event commences, in its entirety, during the Policy Period; such Disinfection Expenses are incurred within thirty (30) days of the first discovery of such Disinfection Event by a Responsible Insured; and the Insured reports the Disinfection Event to the Insurer, in writing, during the Policy Period and within fourteen (14) days of a Responsible Insured's first discovery of such Disinfection Event.
Disinfection Expenses means reasonable fees and costs incurred by the Insured to retain third party qualified vendors to disinfect the actual presence of bacteria or virus at a Covered Property after a Disinfection Event.

SPECIFIC COVERAGE PROVISIONS - CONTINUED:

Coverage F – Coverage for Image Restoration Expenses
To pay on behalf of the Insured, Image Restoration Expenses that directly result from an Image Restoration Event, provided that the Pollution Incident giving rise to the Image Restoration Event is on, at, under or migrating from a Covered Property or results from Transportation or Waste Disposal Activities; the Pollution Incident giving rise to the Image Restoration Expenses commenced, in its entirety, during the Policy Period; such Image Restoration Expenses are incurred by the Insured within fourteen (14) days of the first newspaper or magazine publication or television news broadcast associated with the Pollution Incident giving rise to the Image Restoration. Event; and the Pollution Incident giving rise to the Image Restoration Expenses is reported to the Company, in writing, during the Policy Period and within fourteen (14) days of a Responsible Insured's first discovery of such Image Restoration Event.
Image Restoration Expenses are defined as reasonable and necessary public relations expenses to restore public reputation and consumer confidence. Image Restoration Expenses shall include fees and expenses incurred by public relations or crisis management firms and reasonable and necessary printing, mailing of materials and travel by directors, officers, employees or agents of the Named Insured at the direction of such firms. Image Restoration Expenses shall not include the costs to purchase advertising on television, in newspapers or in any other media.

Supplemental coverage for Contractors Pollution is included. This coverage covers third-party claims arising out of "your work", provided the claim is first made and reported during the policy period. The Contractor's Pollution must have commenced on or after 7/1/2021.

Supplemental coverage for Products Pollution and Exposure Liability is included. This coverage covers third-party claims arising out of product pollution, provided the claim is first made and reported during the policy period. The Products Pollution must have commenced on or after 7/1/2021.

Insured's Products are defined as:

- Potable water manufactured, sold, handled or distributed by the Insured or others trading under the Insured's name, and includes containers (other than automobiles, rolling stock, vessels or aircraft), materials, parts or equipment furnished in connection therewith, and includes warranties or representations made at any time with respect to the fitness, quality, durability, performance or use thereof, or the failure to provide warnings or instructions; or
- Biosolid-derived fertilizers manufactured, sold, handled or distributed by the Insured or others trading under the Insured's name, and includes containers (other than automobiles, rolling stock, vessels or aircraft), materials, parts or equipment furnished in connection therewith, and includes warranties or representations made at any time with respect to the fitness, quality, durability, performance or use thereof, or the failure to provide warnings or instructions.

Illicit Abandonment is included in the definition of pollution condition.

Other Insurance Condition
Any Loss covered under any other valid and collectible insurance, whether primary, excess, contingent, self-insurance, deductible or any other basis, including but not limited to any stand-alone policies purchased by a Named Insured, this insurance shall apply in excess of.

Mold matter and Legionella is included in the definition of Pollutant. Mold matter is defined as mold, mildew and fungi, whether or not such microbial matter is living. Legionella means legionella pnuemophila.

Wildfire is defined as any hostile fire, wildland fire, forest fire, brush fire, vegetation fire, grass fire, peat fire, bushfire, hill hire, desert fire, veldfire, escaped prescribed fire or escaped wildland fire.

SPECIFIC COVERAGE PROVISIONS - CONTINUED:

Automatic Acquisition – Automatic coverage for mid-term real property additions, upon the closing date of such acquisition, or the effective date of such lease, management, rental or occupation right or obligation, respectively, for no additional premium. Notice must be provided to the Insurer within 365 days, along with any supporting documentation reasonably requested by the underwriter. To the extent that the Insured has a Phase I Environmental Assessment ("Phase I") for such acquired real property, a copy must be provided to the Insurer's underwriter, unless the acquired real property is leased, managed or rented.

Coverage does not apply to any Remediation Expenses or Emergency Response Expenses incurred for the remediation of Mold Matter at such Acquired Real Property which is the result of any water intrusion or moisture condition prior to the Insured taking title or occupancy of such property. Any water-intrusion or moisture condition shall include, but not be limited to, any roof or building envelope leak, any heating, ventilation and air conditioning (HVAC) system improvement, replacement or upgrade or any plumbing or pipe leak.

Coverage is limited for Coverages A, B and D to Sudden and Accidental only for the Santa Barbara Municipal Airport. The pollution incident giving rise to such Remediation Expenses or Business Interruption Expenses and Extra Expenses must be discovered by the Insured during the policy period and within fifteen (15) days of commencement, the Pollution Incident is demonstrable as commencing on a specific date, and must be reported to the Insurer in writing during the policy period and no later than forty-five (45) days following the discovery of such Pollution Incident.

Blanket Underground Storage Tank coverage included, with a deductible of $500,000 for storage tanks less than twenty years old, a deductible of $375,000 for storage tanks between twenty and thirty years old, and a deductible of $500,000 for storage tanks which are thirty years old or older. **Note: Does not meet financial assurance requirements.**

Loss covered pursuant to any state storage tank fund, state administered insurance program or restoration funding for any underground storage tank(s) whose owners qualify for reimbursement, or any self-insurance fund established for the purpose of funding clean-up costs for pollution conditions from any underground storage tank(s), shall be considered primary insurance, to which the coverage afforded pursuant to this policy shall apply in excess.

SPECIFIC COVERAGE PROVISIONS - CONTINUED:

Additional Insureds are as follows:

- Any Entity
- If any Named Insured pursuant to this Policy is a Public Entity, the following entities are additional insureds:
    - A governmental agency or subdivision, department, municipal body, commission or board, or a not-for profit corporation which is owned or controlled by any Named Insured;
    - An individual while acting in the capacity as a director of, officer of, trustee of, employee of, temporary or leased worker of, or staff member of, any Named Insured;
    - A volunteer, but solely while acting within the scope of such duties and at the direction of any Named Insured;
    - A paramedic or emergency technician, but solely while acting within the course and scope of employment or while acting as a volunteer pursuant to the direction of any Named Insured;
    - An elective or appointive officer or a member of any such commission, board or agency of any Named Insured but solely while acting within the scope of duties as such; or
    - A joint venture or partnership, including a mutual assistance pact, joint powers agreement or similar association, but only with respect to the conduct of the business of any named Insured on behalf of that entity or association and only to the extent of such Named Insured's participation or interest in that entity or association.

If the Named Insured is an Educational Entity, the following persons or entities are additional insureds, individually and collectively, when acting solely within the scope of their duties, office, or employment for, and pursuant to the supervision of, any Named Insured:

- Members of the School Board;
- Officers;
- Employees;
- Temporary or Leased Workers;
- Authorized individual volunteers; or
- Student Body Organizations pursuant to the jurisdiction of the governing board, but only while pursuant to the supervision required by the governing board.

EXCLUSIONS (including but not limited to):

Coverage does not apply to any claim or loss from:

- Aircraft, Auto or Watercraft – does not apply to Transportation
- Asbestos, PCBs and Lead –
    - Any asbestos, asbestos containing materials, lead, lead containing materials, including but not limited to lead-based paint, polychlorinated biphenyls (PCBs) or materials containing PCBs in, on, at, within or applied to any building, utility, structure or building material. This exclusion does not apply to Claims for Bodily Injury or Property Damage, or Remediation Expenses for the remediation of any soil, groundwater body, surface water body or sediment; or
    - Any asbestos, asbestos containing materials, lead or lead-containing materials, other metals, including but not limited to copper, or metal containing materials in, on or applied to any water supply or collection equipment, system or infrastructure, including but not limited to water service lines; this does not apply to third-party claims for bodily injury or property damage, or for remediation expenses of any groundwater body, surface water body or sediment;

  Further, this exclusion shall not apply to Remediation Expenses solely incurred for the remediation of asbestos, asbestos containing materials or lead-based paint which has been inadvertently displaced (not including any displacement associated with demolition, renovation or abatement) by an accident which occurs, in its entirety, during the Policy Period and is demonstrable by the Insured as commencing during the Policy Period, provided that such accident is reported to the Company within thirty (30) days of its commencement. However, there shall be no coverage for any costs incurred to: remove, abate, repair, dispose of or otherwise address any asbestos, asbestos containing materials or lead-based paint that has not been displaced by such accident, or to remove or dispose of any building, construction or demolition debris. Asbestos is fully excluded under Products Pollution and Exposure Liability coverage.
- Contractual Liability – This exclusion does not apply to liability that the Insured would have had in the absence of the contract or agreement or to liability assumed in an Insured Contract.
- Criminal Punishments
- Divested Property – does not apply to any Covered Property owned by an Insured as of Policy Inception which is leased to a third party, even if the Insured has relinquished operation or management control of such Covered Property, provided that such covered property was disclosed to the Insurer.
- Employer Liability – This exclusion applies whether the Insured may be liable as an employer or in any other capacity, and to any obligation to share damages with or repay someone else who must pay damages because of such Bodily Injury.
- Insured's Internal Expenses
- Insured's Non-Compliance
- Insured vs. Insured
- Insured's Professional Services – any professional services performed or rendered on behalf of the Insured, including but not limited to, medical services, recommendations, opinions and strategies rendered for architectural, consulting and engineering work, such as drawings, designs, maps, reports, surveys, change orders, plan specifications, assessment work, remedy selections site maintenance and equipment selection, and supervisory, inspection or engineering service.
- Material Change In Use – This exclusion shall not apply if the Insured submits prior written notice no less than thirty (30) days prior to such material change, and the Company approves such material change in an endorsement to this Policy issued within thirty (30) days of such notice.

EXCLUSIONS (including but not limited to):

Coverage does not apply to any claim or loss from:

- Non-Disclosure – does not apply to any Inadvertently Omitted Locations
- Nuclear or Radiological Material
- Property Damage to Conveyances
- War
- Workers Compensation, Unemployment, Social Security, Disability and Similar Laws
- Waste Processing, Treatment or Disposal – does not apply to waste disposal activities at a non-owned disposal site.
- Airports – defined as any airport where enplanement occurs and/o cargo is moved for a fee and storage, transportation and the dispensing of fuel and/or de-icing solution operations are conducted. This exclusion shall not apply to passenger airports with less than 2,500 passenger boardings per year, or to the Santa Barbara Municipal Airport.
- Oil and/or Gas Operations – only applies to oil and/or gas producing and refining facilities
- Firearms, Explosives or Military Weapons
- Activity Use Limitation
- Landfill Closure, Post-Closure and Reclamation Costs – any closure, post closure or reclamation costs or obligations, including but not limited to any costs associated with landfill caps or gas or leachate systems. Does not apply to claims for Bodily Injury or Property Damage.
- Combined Sewer Overflow – defined as any discharge of stormwater and / or wastewater into any body of water, including surface water or groundwater, arising from a sewer system (including but not limited to sewer lines, pipes, pumping stations, appurtenances and treatment plants) that handles both wastewater and stormwater due to the volume of stormwater and/or wastewater exceeding the capacity of such sewer system.
- Commercial Ports – Any commercial port where ships load and unload cargo.
- Landfill
- Odor - Solely with respect to any Pollution Incident on, at, under or migrating from any location used (in whole or part) at any time (currently or historically) for the collection, treatment, recycling, management, incineration or disposal of waste materials, any Claim, in whole or part, due to or in any way associated with any odor; any Claim for Bodily Injury or Property Damage due to or associated with any gas or emissions that have migrated beyond the boundaries of a Covered Property; or any Claim for public or private nuisance due to or associated with any odor or any gas or emissions migration.
- Impoundments
- Engineering Controls / Operation and Maintenance (O&M) Costs
- Groundwater and Surface Water Monitoring Costs
- COVID-19
- Capital Improvement – Applies to all locations, also applies to removal, replacement, repair or upgrade of an underground storage tank.
- Voluntary Site Investigation – Applies to all locations.
- Expected or Intended Injury or Damage (Product Pollution and Covered Operations only)
- Known Injury or Damage (Product Pollution and Covered Operations only)
- Product Disposal (Product Pollution Only)
- Products as Waste (Product Pollution Only)
- Transportation (Product Pollution only)
- Damage to the Insured's Product (Product Pollution Only)
- Drinking Water Standards Exceedance (Product Pollution Only)
- Material Change in Potable Water Supply Source (Product Pollution Only)
- Conveyance (Covered Operations only)
- Business Interruption (Covered Operations Only)
- Owned Property (Covered Operations Only)
- Damage to Your Work (Covered Operations Only)

EXCLUSIONS (including but not limited to, Cont.):

- Any perfluorinated compound (PFC) or perfluoroalkyl or polyfluoroalkyl substance, including but not limited to 10:2 fluorotelomer sulfonic acid (10:2 FTS); 11-chloroeicosafluoro-3-oxaundecane-1-sulfonic acid (11ClPF3OUdS); 2H,2H,3H,3H-perfluorodecanoic acid (7:3 FTCA); 2H,2H,3H,3H-perfluorohexanoic acid (3:3 FTCA); 2H,2H,3H,3Hperfluorooctanoic acid (5:3 FTCA); 4,8-dioxa-3H-perfluorononanoic acid (ADONA); 4:2 fluorotelomer sulfonic acid (4:2 FTS); 6:2 fluorotelomer sulfonic acid (6:2 FTS); 8:2 fluorotelomer sulfonic acid (8:2 FTS); 9-chlorohexadecafluoro-3oxanonane-1-sulfonic acid (9ClPF3ONS); n-ethyl perfluorooctane sulfonamido ethanol (NEtFOSE); hexafluoropropylene oxide dimer acid (HFPO-DA or GenX); n-methyl perfluorooctane sulfonamido ethanol (NMeFOSE); n-ethyl perfluorooctanesulfonamidoacetic acid (NEtFOSAA); n-ethyl perfluorooctane sulfonamide (NEtFOSA); n-methyl perfluorooctanesulfonamidoacetic acid (NMeFOSAA); n-methyl perfluorooctane sulfonamide (MeFOSA); nonafluoro3,6-dioxaheptanoic acid (NFDHA); perfluoro(2-ethoxyethane) sulfonic acid (PFEESA); perfluoro-3-methoxypropanoic acid (PFMPA); perfluoro-4-methoxybutanoic acid (PFMBA); perfluorobutane sulfonic acid (PFBS); perfluorobutanoic acid (PFBA); perfluorodecane sulfonic acid (PFDS); perfluorodecanoic acid (PFDA); perfluorododecanoic acid (PFDoA); perfluoroheptane sulfonic acid (PFHpS); perfluoroheptanoic acid (PFHpA); perfluorohexadecanoic acid (PFHxDA); perfluorohexane sulfonic acid (PFHxS); perfluorohexanoic acid (PFHxA); perfluorononane sulfonic acid (PFNS); perfluorononanoic acid (PFNA); perfluorooctadecanoic acid (PFODA); perfluorooctane sulfonamide (PFOSA); perfluorooctane sulfonic acid (PFOS); perfluorooctanoic acid (PFOA); perfluoropentane sulfonic acid (PFPeS); perfluoropentanoic acid (PFPeA); perfluorotetradecanoic acid (PFTA); perfluorotridecanoic acid (PFTrDA); perfluoroundecanoic acid (PFUnA); perfluorodedecanesulfonic acid (PFDoS); polytetrafluoroethylene (PTFE); 8:2 fluorotelomer unsaturated carboxylic acid (8:2 FTUCA) or 8:2 polyfluoroalkyl phosphate diester (8:2 diPAP), or any precursor chemicals. PFAS shall include: (i) any PFAS that falls within the structural definition set forth in 40 CFR 705.3, or any additions or amendments thereto; (ii) any anion forms, structural isomers or salts of PFAS associated with their corresponding acid forms, or any processing aids or residual materials contained therein; or (iii) any transformation or degradation compounds of PFAS. Further, PFAS shall also include aqueous film forming foam (AFFF) containing PFAS or any additives or component materials contained therein or degradation by-products thereof.

DEDUCTIBLE:

$	250,000	Each Pollution Incident After July 1, 2021
$	500,000	Each Pollution Incident Prior to July 1, 2021

Any payments for covered loss paid by other insurance shall also be applied against the deductible amount.

SPECIFIC DEDUCTIBLES:	$ 250,000		Disinfection Event Expenses
	$ 250,000		Image Restoration Expenses
	$ 250,000		Products Pollution and Exposure Liability
	$ 250,000	*	Covered Operations
	$ 350,000		Mold Matter (*or $25,000 per room impacted, whichever is greater, with a $2,500,000 maximum – a room is considered equal to 250 sq ft of floor space, education, healthcare and hospitality locations only)
	$ 500,000		Legionella
	$ 500,000		Sewer Backup and Overcharge deductible
	$ 250,000		Underground Storage Tanks (less than 20 years old)
	$ 375,000		Underground Storage Tanks (20-30 years old)
	$ 500,000		Underground Storage Tanks (more than 30 years old)
	$ 1,000,000		Wildfire Deductible
	5 Days		Business Interruption Waiting Period

CLAIMS REPORTING NOTICE

PLEASE NOTE THAT POLLUTION LIABILITY POLICIES CONTAIN EXTREMELY STRICT CLAIM REPORTING PROCEDURES. Below please find your policy specific claim reporting requirements - Please make sure you understand these obligations. Contact your Alliant Service Team with any questions.

THIS IS A CLAIMS MADE POLICY

This claims-made policy contains a requirement stating that this policy applies only to any claim first made against the Insured and reported to the insurer during the policy period or applicable extended reporting period. Claims must be submitted to the insurer during the policy period, or applicable extended reporting period, as required pursuant to the Claims/Loss Notification Clause within the policy in order for coverage to apply. Late reporting or failure to report pursuant to the policy's requirements could result in a disclaimer of coverage by the insurer.

LOSS REPORTING REQUIREMENTS:	Written notice of any claim or pollution condition, within seven (7) days of discovery for pollution conditions requiring immediate emergency response. Concurrently, please send to: 1) Ironshore Environmental Claims CSO 28 Liberty Street, 5th Floor New York, NY 10005 Office By phone via: 24 Hour Claims Phone Number (888) 292-0249 FAX to: 646-826-6601 Email: USClaims@ironshore.com 2) Akbar Sharif Alliant Insurance Services, Inc. 18100 Von Karman Avenue 10th Floor Irvine, CA 92612 949 260-5088 949 756-2713 – fax Akbar.Sharif@alliant.com

NOTICE OF CANCELLATION:	90 days except 10 days for non-payment of premium
REINSTATEMENT PROVISIONS:	Not Provided
POLLUTION LIABILITY COST:	Cost is included in Total Property Premium 100% Earned Premium at Inception
QUOTE VALID UNTIL:	July 1, 2025
BROKER:	**ALLIANT INSURANCE SERVICES, INC.** **License No. 0C36861**

NOTES:

- ***This evidence attachment is based on the current loss experience and is subject to change if this insured's loss ratio deteriorates further and/or if the markets suffer a catastrophic event.***
- ***Coverage outlined in this Evidence Attachment is subject to the terms and conditions set forth in the policy.***
- ***Please refer to Policy for specific terms, conditions and exclusions.***
- ***Change in Total Insurable Values will result in adjustment in premium.***

SUMMARY OF BOUND CHANGES

THE FOLLOWING ITEMS ARE CHANGES FOR THE 2025-2026 POLICY TERM

Coverage	2024-2025	2025-2026 Changes
Pollution Liability Policy Term	July 1, 2024 to July 1,2025	July 1, 2025 to July 1, 2026
Retroactive Date	This coverage shall only apply if the Pollution Incident or Disinfection Event giving rise to the Claim, Loss, Business Interruption Expenses or Extra Expenses commenced, in its entirety, on or after July 1, 2011, or the date that the Insured first joined the Alliant Property Insurance Program (APIP) for environmental or pollution insurance coverage, whichever is later, except for the following coverages: • July 1, 2024 for Products Pollution and Exposure Liability; • July 1, 2024 for Contractor's Pollution • July 1, 2024 for Mold Matter	This coverage shall only apply if the Pollution Incident or Disinfection Event giving rise to the Claim, Loss, Business Interruption Expenses or Extra Expenses commenced, in its entirety, on or after July 1, 2011, or the date that the Insured first joined the Alliant Property Insurance Program (APIP) for environmental or pollution insurance coverage, whichever is later, except for the following coverages: • July 1, 2021 for Products Pollution and Exposure Liability; • July 1, 2021 for Contractor's Pollution • July 1, 2021 for Mold Matter
A.M. Best Insurance Rating	A, Excellent, Financial Category XV ($2 Billion or greater) Effective August 8, 2023	A, Excellent, Financial Category XV ($2 Billion or greater) Effective August 2, 2024
Standard and Poors Insurance Rating	A (Strong) as of February 28, 2024	A (Strong) as of May 19, 2024
Covered Property	Covered locations are defined as any location identified in one of the SOVs listed above, on file with the Insurer, as of Policy Inception, including, but not limited to, any subsurface potable water, wastewater or storm water pipelines to or from a Covered Location provided that such pipelines are located within a one thousand (1,000) foot radius of such Covered Location. Also includes any inadvertently omitted location and any location scheduled to this policy by endorsement.	Covered locations are defined as any real property owned, leased, rented, operated or occupied by the Insured as of Policy Inception, including, but not limited to, any subsurface potable water, wastewater or storm water pipelines to or from a Covered Location provided that such pipelines are located within a one thousand (1,000) foot radius of such Covered Location. Also includes any roads including, but not limited to, any alleys, streets or bridges owned or operated by the Insured, any vacant land, including any parks, open spaces, easements or rights-of-way owned or operated by the Insured any location scheduled to this policy by endorsement.
Sub-Limits	$2,000,000 Mold Matter Loss, Business Interruption and Extra Expense Program Aggregate*	$5,000,000 Mold Matter Loss, Business Interruption and Extra Expense Program Aggregate*
	$1,000,000 Legionella Per Named Insured Aggregate*	*Deleted*
	$2,000,000 Sewer Backup and Overcharge Program Aggregate*	$3,000,000 Sewer Backup and Overcharge Program Aggregate*

SUMMARY OF BOUND CHANGES

THE FOLLOWING ITEMS ARE CHANGES FOR THE 2025-2026 POLICY TERM

Coverage	2024-2025		2025-2026 Changes	
Sub-Limits (Continued)	$2,000,000	Lead or Lead Containing Materials Program Aggregate – All Claims*	$3,000,000	Lead or Lead Containing Materials Program Aggregate – All Claims*
	$5,000,000	Products Pollution and Exposure Liability Program Aggregate*	$5,000,000	Products Pollution and Exposure Liability Program Aggregate - Biosolids*
			$10,000,000	Products Pollution and Exposure Liability Program Aggregate – Potable Water*
	$5,000,000	Contractors Pollution Program Aggregate* - All other Operations*	$10,000,000	Contractors Pollution Program Aggregate* - All other Operations*
	$500,000	Inadvertently Omitted Location Per Named Insured Aggregate Sublimit*	*Deleted*	
Specific Coverage Provisions (Continued)	Supplemental coverage for Contractors Pollution is included. This coverage covers third-party claims arising out of "your work", provided the claim is first made and reported during the policy period. The Contractor's Pollution must have commenced on or after 7/1/2024.		Supplemental coverage for Contractors Pollution is included. This coverage covers third-party claims arising out of "your work", provided the claim is first made and reported during the policy period. The Contractor's Pollution must have commenced on or after 7/1/2021.	
	Supplemental coverage for Products Pollution and Exposure Liability is included. This coverage covers third-party claims arising out of product pollution, provided the claim is first made and reported during the policy period. The Products Pollution must have commenced on or after 7/1/2024.		Supplemental coverage for Products Pollution and Exposure Liability is included. This coverage covers third-party claims arising out of product pollution, provided the claim is first made and reported during the policy period. The Products Pollution must have commenced on or after 7/1/2021.	
	Automatic Acquisition – Coverage for mid-term transactions for values that are less than $25,000,000 shall be added as a covered location, upon the closing date of such acquisition, or the effective date of such lease, management, rental or occupation right or obligation, respectively, for no additional premium. An application and notification of title or occupancy must be provided to Ironshore within 180 days. Property valued at more than $25,000,000 purchased, leased or otherwise acquired by the Insured needs to be reported to the Insurer within 180 days, along with a completed and signed Site Pollution Incident Legal Liability Select Application and shall be added as a covered location upon the closing date of such acquisition subject to an additional premium of $0.009885 per $1,000 of Total Insurable Values, pro-rated with a minimum premium of $450. There will be no additional		Automatic Acquisition – Automatic coverage for mid-term real property additions, upon the closing date of such acquisition, or the effective date of such lease, management, rental or occupation right or obligation, respectively, for no additional premium. Notice must be provided to the Insurer within 365 days, along with any supporting documentation reasonably requested by the underwriter. To the extent that the Insured has a Phase I Environmental Assessment ("Phase I") for such acquired real property, a copy must be provided to the Insurer's underwriter, unless the acquired real property is leased, managed or rented.	

SUMMARY OF BOUND CHANGES

THE FOLLOWING ITEMS ARE CHANGES FOR THE 2025-2026 POLICY TERM

Coverage	2024-2025	2025-2026 Changes
	premium for any Covered Property with Total Insurable Values which are less than $25,000,000.	
	Coverage is limited for Coverages A, B and D to Sudden and Accidental only for any location with Current or Historic use as an Airport or any associated facility. The pollution incident giving rise to such Remediation Expenses or Business Interruption Expenses and Extra Expenses must be discovered by the Insured during the policy period and within seven (7) days of commencement, the Pollution Incident is demonstrable as commencing on a specific date, and must be reported to the Insurer in writing during the policy period and no later than twenty-one (21) days following the discovery of such Pollution Incident.	Coverage is limited for Coverages A, B and D to Sudden and Accidental only for the Santa Barbara Municipal Airport. The pollution incident giving rise to such Remediation Expenses or Business Interruption Expenses and Extra Expenses must be discovered by the Insured during the policy period and within fifteen (15) days of commencement, the Pollution Incident is demonstrable as commencing on a specific date, and must be reported to the Insurer in writing during the policy period and no later than forty-five (45) days following the discovery of such Pollution Incident.
	Blanket Underground Storage Tank coverage included, with a deductible of $500,000 for storage tanks less than twenty-five years old, and a deductible of $1,000,000 for storage tanks older than twenty-five years. **Note: Does not meet financial assurance requirements.**	Blanket Underground Storage Tank coverage included, with a deductible of $500,000 for storage tanks less than twenty years old, a deductible of $375,000 for storage tanks between twenty and thirty years old, and a deductible of $500,000 for storage tanks which are thirty years old or older. **Note: Does not meet financial assurance requirements.**
Exclusions	Any asbestos, asbestos containing materials, lead, lead containing materials, including but not limited to leadbased paint, polychlorinated biphenyls (PCBs) or materials containing PCBs in, on, at, within or applied to any building, utility, structure or building material. This exclusion does not apply to Claims for Bodily Injury or Property Damage, or Remediation Expenses for the remediation of any soil, groundwater body, surface water body or sediment; or	Any asbestos, asbestos containing materials, lead, lead containing materials, including but not limited to lead-based paint, polychlorinated biphenyls (PCBs) or materials containing PCBs in, on, at, within or applied to any building, utility, structure or building material. This exclusion does not apply to Claims for Bodily Injury or Property Damage, or Remediation Expenses for the remediation of any soil, groundwater body, surface water body or sediment; or
	Airports – defined as any airport where enplanement occurs and/or cargo is moved for a fee and storage, transportation and the dispensing of fuel and/or de-icing solution operations are conducted. This exclusion shall not apply to passenger airports with less than 2,500 passenger boardings per year.	Airports – defined as any airport where enplanement occurs and/or cargo is moved for a fee and storage, transportation and the dispensing of fuel and/or de-icing solution operations are conducted. This exclusion shall not apply to passenger airports with less than 2,500 passenger boardings per year, or to the Santa Barbara Municipal Airport.
	Damage to Property (Covered Operations Only)	Owned Property (Covered Operations Only)

SUMMARY OF BOUND CHANGES

THE FOLLOWING ITEMS ARE CHANGES FOR THE 2025-2026 POLICY TERM

Coverage	2024-2025	2025-2026 Changes
Exclusions, Continued	Any perfluoroalkyl or polyfluoroalkyl substance (PFAS), including but not limited to perfluoroalkyl acids (PFAAs), perfluorooctanoic acid (PFOA), perfluorooctane sulfonate (PFOS), perfluoroheptanoic acid (PFHpA), perfluorononanoic acid (PFNA), perfluorohexanesulfonic acid (PFHxS), GenX, "C8", "ADONA," perfluoroalkane sulfonyl fluoride (PASF), perfluorobutanesulfonic acid (PFBS), polytetrafluoroethylene (PTFE), perfluoropolyethers (PFPEs), fluoropolymers, perfluorononanoic acid or ammonium perfluorooctanoate , or any associated salts, acids, alcohols, precursor chemicals or related higher homologue chemicals. Further, Pollutants shall not include aqueous film forming foam (AFFF) containing PFAS (at any concentration) or any additives or component materials contained therein or degradation by-products thereof.	Any perfluorinated compound (PFC) or perfluoroalkyl or polyfluoroalkyl substance, including but not limited to 10:2 fluorotelomer sulfonic acid (10:2 FTS); 11-chloroeicosafluoro-3-oxaundecane-1-sulfonic acid (11ClPF3OUdS); 2H,2H,3H,3H-perfluorodecanoic acid (7:3 FTCA); 2H,2H,3H,3H-perfluorohexanoic acid (3:3 FTCA); 2H,2H,3H,3Hperfluorooctanoic acid (5:3 FTCA); 4,8-dioxa-3H-perfluorononanoic acid (ADONA); 4:2 fluorotelomer sulfonic acid (4:2 FTS); 6:2 fluorotelomer sulfonic acid (6:2 FTS); 8:2 fluorotelomer sulfonic acid (8:2 FTS); 9-chlorohexadecafluoro-3oxanonane-1-sulfonic acid (9ClPF3ONS); n-ethyl perfluorooctane sulfonamido ethanol (NEtFOSE); hexafluoropropylene oxide dimer acid (HFPO-DA or GenX); n-methyl perfluorooctane sulfonamido ethanol (NMeFOSE); n-ethyl perfluorooctanesulfonamidoacetic acid (NEtFOSAA); n-ethyl perfluorooctane sulfonamide (NEtFOSA); n-methyl perfluorooctanesulfonamidoacetic acid (NMeFOSAA); n-methyl perfluorooctane sulfonamide (MeFOSA); nonafluoro3,6-dioxaheptanoic acid (NFDHA); perfluoro(2-ethoxyethane) sulfonic acid (PFEESA); perfluoro-3-methoxypropanoic acid (PFMPA); perfluoro-4-methoxybutanoic acid (PFMBA); perfluorobutane sulfonic acid (PFBS); perfluorobutanoic acid (PFBA); perfluorodecane sulfonic acid (PFDS); perfluorodecanoic acid (PFDA); perfluorododecanoic acid (PFDoA); perfluoroheptane sulfonic acid (PFHpS); perfluoroheptanoic acid (PFHpA); perfluorohexadecanoic acid (PFHxDA); perfluorohexane sulfonic acid (PFHxS); perfluorohexanoic acid (PFHxA); perfluorononane sulfonic acid (PFNS); perfluorononanoic acid (PFNA); perfluorooctadecanoic acid (PFODA); perfluorooctane sulfonamide (PFOSA); perfluorooctane sulfonic acid (PFOS); perfluorooctanoic acid (PFOA); perfluoropentane sulfonic acid (PFPeS); perfluoropentanoic acid (PFPeA); perfluorotetradecanoic acid (PFTA); perfluorotridecanoic acid (PFTrDA); perfluoroundecanoic acid (PFUnA); perfluorododecanesulfonic acid (PFDoS); polytetrafluoroethylene (PTFE); 8:2 fluorotelomer unsaturated carboxylic acid (8:2 FTUCA) or 8:2 polyfluoroalkyl phosphate diester (8:2 diPAP), or any precursor chemicals. PFAS shall include: (i) any PFAS that falls within the structural definition set forth in 40 CFR 705.3, or any additions or amendments thereto; (ii) any anion forms, structural isomers or salts of PFAS associated with their corresponding acid forms, or any processing aids or residual materials contained therein; or (iii) any transformation or degradation compounds of PFAS. Further, PFAS shall also include aqueous film forming foam (AFFF) containing PFAS or any additives or component materials contained therein or degradation by-products thereof.

SUMMARY OF BOUND CHANGES

THE FOLLOWING ITEMS ARE CHANGES FOR THE 2025-2026 POLICY TERM

Coverage	2024-2025		2025-2026 Changes	
Specific Deductibles	$350,000	Mold Matter (*or $50,000 per room impacted, whichever is greater – a room is considered equal to 250 sq ft of floor space, education, healthcare and hospitality locations only)	$350,000	Mold Matter (*or $25,000 per room impacted, whichever is greater, with a $2,500,000 maximum – a room is considered equal to 250 sq ft of floor space, education, healthcare and hospitality locations only)
	$500,000	Underground Storage Tanks (less than 25 years old)	$250,000	Underground Storage Tanks (less than 20 years old)
		<Not Applicable>	$375,000	Underground Storage Tanks (20-30 years old)
	$1,000,000	Underground Storage Tanks (more than 25 years old)	$500,000	Underground Storage Tanks (more than 30 years old)
Quote Valid Until	July 1, 2024		July 1, 2025	

LOSS NOTIFICATION REQUIREMENT
ALLIANT PROPERTY INSURANCE PROGRAM (APIP)

Claim notifications need to be sent to Robert Frey, Diana Walizada and Sandra Doig. In the event this is a *Cyber* loss please include item III contact, for a *Pollution* loss please include item IV contact in addition to Alliant Insurance Services contacts.

I. During regular business hours (between 8:30 AM and 5:00 PM PST), First Notice of Claim should be reported to Alliant Insurance Services via telephone, fax, mail or e-mail to our San Francisco Office:

Robert A. Frey, RPA Senior Vice President, Regional Claims Director Voice: (415) 403-1445 Email: **rfrey@alliant.com**	Diana L. Walizada, AIC, CPIW, RPA, AINS Vice President, Claims Unit Manager Voice:(415)403-1453 Email: **dwalizada@alliant.com**
Address:	Alliant Insurance Services, Inc. 560 Mission Street, 6th Floor San Francisco CA 94105 Toll Free Voice: (877) 725-7695 Fax: (415) 403-1466

II. Please be sure to include APIP's Claim Administrator as a CC on all Claims correspondence:

	Sandra Doig McLaren's Global Claims Services
Address:	18100 Von Karman Avenue, 10th Floor Irvine, CA 92612 Voice: (949) 757-1413 Fax: (949) 757-1692 Email: **sandra.doig@mclarens.com**

III. Cyber Liability Carrier Beazley NY needs to also be provided with Notice of Claim immediately (if purchased):

	Beazley Group
Address:	1270 Avenue of the America's, Suite 1200 New York, NY 10020 Fax: (546) 378-4039 Email: **bbr.claims@beazley.com**
	Elaine G. Tizon, V.P. CISR, E-mail: **elaine.tizon@alliant.com** Donna Peterson, E-mail: **donna.peterson@alliant.com**
Address:	560 Mission Street, 6th Floor San Francisco, CA 94105 Voice: (415) 403-1458 Fax: (415) 403-1466

IV. Pollution Liability Carrier Ironshore Specialty Insurance Company (if purchased):

	Ironshore Environmental Claims CSO
Address:	28 Liberty Street, 5th Floor New York, NY 10005 In emergency call: (888) 292-0249 Fax: (646) 826-6601 Email: **USClaims@ironshore.com**
	Akbar Sharif Claims Advocate
Address:	18100 Von Karman Avenue, 10th Floor Irvine, CA 92612 Voice: (949) 260-5088 Fax: (415) 403-1466 Email: **akbar.sharif@alliant.com**

Please include the Insured /JPA name along with the following information when reporting claims:

- Time, date and specific location of property damaged
- A description of the incident that caused the damage (such as fire, theft or water damage)
- Estimated amount of loss in dollars
- Contact person for claim including name, title, voice & fax numbers
- Complete and return the Property Loss Notice for processing.
- Mortgagee or Loss Payee name, address, and account number

Applicable in Arizona

For your protection, Arizona law requires the following statement to appear on this form. Any person who knowingly presents a false or fraudulent claim for payment of a loss is subject to criminal and civil penalties.

Applicable in Arkansas, Delaware, District of Columbia, Kentucky, Louisiana, Maine, Michigan, New Jersey, New Mexico, New York, North Dakota, Pennsylvania, South Dakota, Tennessee, Texas, Virginia and West Virginia

Any person who knowingly and with intent to defraud any insurance company or another person, files a statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact, material thereto, commits a fraudulent insurance act, which is a crime, subject to criminal prosecution and [NY: substantial] civil penalties. In DC, LA, ME, TN and VA, insurance benefits may also be denied.

Applicable in California

For your protection, California law requires the following to appear on this form: Any person who knowingly presents a false or fraudulent claim for payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

Applicable in Colorado

It is unlawful to knowingly provide false, incomplete, or misleading facts or information to an insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance, and civil damages. Any insurance company or agent of an insurance company who knowingly provides false, incomplete, or misleading facts or information to a policy holder or claimant for the purpose of defrauding or attempting to defraud the policy holder or claimant with regard to a settlement or award payable from insurance proceeds shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

Applicable in Florida and Idaho

Any person who Knowingly and with the intent to injure, Defraud, or Deceive any Insurance Company Files a Statement of Claim Containing any False, Incomplete or Misleading information is Guilty of a Felony.*
* In Florida - Third Degree Felony

Applicable in Hawaii

For your protection, Hawaii law requires you to be informed that presenting a fraudulent claim for payment of a loss or benefit is a crime punishable by fines or imprisonment, or both.

Applicable in Indiana

A person who knowingly and with intent to defraud an insurer files a statement of claim containing any false, incomplete, or misleading information commits a felony.

Applicable in Minnesota

A person who files a claim with intent to defraud or helps commit a fraud against an insurer is guilty of a crime.

Applicable in Nevada

Pursuant to NRS 686A.291, any person who knowingly and willfully files a statement of claim that contains any false, incomplete or misleading information concerning a material fact is guilty of a felony.

Applicable in New Hampshire

Any person who, with purpose to injure, defraud or deceive any insurance company, files a statement of claim containing any false, incomplete or misleading information is subject to prosecution and punishment for insurance fraud, as provided in RSA 638:20.

Applicable in Ohio

Any person who, with intent to defraud or knowing that he/she is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement is guilty of insurance fraud.

Applicable in Oklahoma

WARNING: Any person who knowingly and with intent to injure, defraud or deceive any insurer, makes any claim for the proceeds of an insurance policy containing any false, incomplete or misleading information is guilty of a felony.

IN THE EVENT OF A

PROPERTY LOSS:

1) Follow your organization procedures for reporting and responding to an incident

2) Alert local emergency authorities, as appropriate

3) Report the incident to Alliant Insurance Services *immediately at:*

877-725-7695

All property losses must be reported as soon as practicable upon knowledge within the risk management or finance division of the insured that a loss has occurred.

Be prepared to give basic information about the location and nature of the incident, as well as steps which have been taken in response to the incident.

4) Report the incident to McLarens Global Claims Services AND your Alliant representative

PROPERTY FIRST NOTICE OF LOSS FORM

SEND TO: Alliant Insurance Services, Inc.
BY MAIL: 560 Mission Street, 6th Floor, San Francisco, CA 94105
BY FAX: (415) 403-1466
BY EMAIL: rfrey@alliant.com AND dwalizada@alliant.com
Carbon Copy APIP Claims Administrator: sandra.doig@mclarens.com and your Alliant representative

Today's Date: _____

Type of Claim: (check all that apply)

☐ **Real Property** ☐ **Vehicles**

☐ **Personal Property** ☐ **Other**

Insured's Name & Contact Information

Insured's Name: _____ **Point of Contact:** _____

Address: _____

Phone #: _____ **Email Address:** _____

Broker/Agent's Name & Contact Information

Company Name: Alliant Insurance Services - Claims **Point of Contact:** Robert A. Frey & Diana L. Walizada

Address: 560 Mission Street, 6th Floor, San Francisco, CA 94105

Phone #: 877-725-7695 **Fax #:** 415-403-1466

Policy Information

Policy Number: APIP2025 (Dec 28) **Policy Period:** July 1, 2025-July 1, 2026

Limits of Liability: _____ **per** _____ **agg** **Self-Insured Retention/Deductible:** _____

Loss Information

Date of Incident/Claim: _____ **Location:** _____

Description of Loss: _____

_____

Please list all attached or enclosed documentation: ☐ **(check if none provided)** _____

_____

Name of Person Completing This Form: _____ **Signature:** _____

Per the Master Policy Wording, Section IV General Conditions;

L. NOTICE OF LOSS

In the event of loss or damage insured against under this Policy, the Insured shall give notice thereof to ALLIANT INSURANCE SERVICES, INC., 560 Mission Street, 6th Floor, San Francisco, CA 94105. TEL NO. (877) 725-7695, FAX NO. (415) 403-1466 of such loss. Such notice is to be made as soon as practicable after the inception of loss.

IN THE EVENT OF A

CYBER LOSS:

1) *Follow your organizations procedures for reporting and responding to an incident*

2) *Alert authorities, as appropriate*

3) *Report the incident to* Beazley Group *immediately at:*

bbr.claims@beazley.com

(866)567-8570

All Cyber losses must be reported as soon as practicable upon knowledge by the insured that a loss has occurred.

Be prepared to give basic information about the location and nature of the incident, as well as steps which have been taken in response to the incident.

4) *Report the incident to Alliant Claims Department and your Alliant representative*

SPECIAL NOTE REGARDING PRIVACY NOTIFICATION COSTS:

The policy provides a $500,000 Aggregate Limit for Privacy Notification Costs. If you utilize a Beazley vendor, the limit is increased to $1,000,000.

Please contact Beazley for a list of approved vendors.

CYBER FIRST NOTICE OF LOSS FORM

SEND TO: Beazley Group

BY MAIL: 1270 Avenue of the America's, Suite 1200, New York, NY 10020

BY FAX: (546) 378-4039

BY EMAIL: bbr.claims@beazley.com

CC Alliant Claims Department:
elaine.tizon@alliant.com, Donna.Peterson@alliant.com and your Alliant representative

Today's Date: _____

Insured's Name & Contact Information

Insured's Name:_____ Point of Contact:_____

Address:_____

Phone #:_____ Email Address:_____

Broker/Agent's Name & Contact Information

Company Name: Alliant Insurance Services – Claims Point of Contact: Elaine Tizon

Address: 560 Mission Street, 6th Floor, San Francisco, CA 94105

Phone #: 877-725-7695 Fax #:415-403-1466

Policy Information

Policy Number: FN2505500_____ Policy Period: July 1, 2025-July 1, 2026

Limits of Liability:_____per_____agg Self-Insured Retention/Deductible_____

Loss Information

Date of Incident/Claim:_____ Location:_____

Description of Loss:_____

_____

Please list all attached or enclosed documentation: ☐(check if none provided)_____

_____

Name of Person Completing This Form:_____Signature:_____

A. NOTICE OF CLAIM, LOSS OR CIRCUMSTANCE THAT MIGHT LEAD TO A CLAIM

1. If any **Claim** is made against the **Insured**, the **Insured** shall, as soon as practicable upon knowledge by the **Insured**, forward to the Underwriters through persons named in Item 9.A. of the Declarations written notice of such **Claim** in the form of a telecopy, or express or certified mail together with every demand, notice, summons or other process received by the **Insured** or the **Insured's** representative; provided that with regard to coverage provided under Insuring Agreements I.A. and I.C., all **Claims** made against any **Insured** must be reported no later than the end of the **Policy Period**, in accordance with the requirements of the **Optional Extension Period** (if applicable), or within thirty (30) days after the expiration date of the **Policy Period** in the case of **Claims** first made against the Insured during the last thirty (30) days of the **Policy Period**.

2. With respect to Insuring Agreement I.B. for a legal obligation to comply with a **Breach Notice Law** because of an incident (or reasonably suspected incident) described in Insuring Clause I.A.1 or I.A.2, such incident or reasonably suspected incident must be reported as soon as practicable during the **Policy Period** after discovery by the Insured. For such incidents or suspected incidents discovered by the **Insured** within 60 days prior to expiration of the Policy, such incident shall be reported as soon as practicable, but in no event later than 60 days after the end the **Policy Period**, provided; if this Policy is renewed by Underwriters and covered **Privacy Notification Costs** are incurred because of such incident or suspected incident reported during the 60 day post **Policy Period** reporting period, then any subsequent **Claim** arising out of such incident or suspected incident is deemed to have been made during the **Policy Period**.

3. With respect to Insuring Agreements I.A. and I.C., if during the **Policy Period**, the **Insured** first becomes aware of any circumstance that could reasonably be the basis for a **Claim** it may give written notice to Underwriters in the form of a telecopy, or express or certified mail through persons named in Item 9.A. of the Declarations as soon as practicable during the **Policy Period** of:

   a. the specific details of the act, error, omission, or **Security Breach** that could reasonably be the basis for a **Claim**;
   b. the injury or damage which may result or has resulted from the circumstance; and
   c. the facts by which the **Insured** first became aware of the act, error, omission or **Security Breach**

   Any subsequent **Claim** made against the **Insured** arising out of such circumstance which is the subject of the written notice will be deemed to have been made at the time written notice complying with the above requirements was first given to the Underwriters.

4. A **Claim** or legal obligation under section X.A.1 or X.A.2 above shall be considered to be reported to the Underwriters when written notice is first received by Underwriters in the form of a telecopy, or express or certified mail or email through persons named in Item 9.A. of the Declarations of the **Claim** or legal obligation, or of an act, error, or omission, which could reasonably be expected to give rise to a **Claim** if provided in compliance with sub-paragraph X.A.3. above.

POLLUTION LIABILITY

IN THE EVENT OF AN

ENVIRONMENTAL EMERGENCY:

1) ***Follow your organization procedures for reporting and responding to an incident***

2) ***Alert local emergency authorities, as appropriate***

3) ***Report the incident immediately at:***

888-292-0249

4] Report the incident to Alliant

Akbar Sharif
Claims Advocate
949-260-5088
415-403-1466 – fax
akbar.sharif@alliant.com

Be prepared to give basic information about the location and nature of the incident, as well as steps which have been taken in response to the incident.

DO follow your organization's detailed response plan
DO contact your management as well as appropriate authorities
DO ensure anyone who could come in contact with a spill or release is kept away

DO NOT ignore a potential spill or leak
DO NOT attempt to respond beyond your level of training or certification

SEND TO: IRONSHORE ENVIRONMENTAL CLAIMS CSO

BY MAIL: 28 Liberty Street, 5th Floor, New York, NY 10005

BY PHONE: (888) 292-0249

BY FAX: (646) 826-6601

BY EMAIL: USClaims@ironshore.com

CC Alliant Insurance: akbar.sharif@alliant.com and your Alliant Representative

Today's Date: _____

Notice of: (check all that apply)

☐ Pollution Incident ☐ Potential Claim ☐ Other _____

☐ Third-Party Claim ☐ Litigation Initiated

Insured's Name & Contact Information

Company Name:_____ Point of Contact:_____

Address:_____

Phone #:_____ Email Address:_____

Broker/Agent's Name & Contact Information

Company Name: Alliant Insurance Services - Claims Point of Contact: Akbar Sharif

Address: 18100 Von Karman Ave., 10th Floor, Irvine, CA 92612

Phone #: 949-260-5088

Policy Information

Policy Number: ISPILLSCAZ0U005 Policy Period: July 1, 2025-July 1, 2026

Limits of Liability: _____per_____ agg. Self-Insured Retention/Deductible_____

Loss Information

Date of Incident/Claim:_____ Location:_____

Claimant Name/Address:_____

Description of Loss:_____

_____

Please list all attached or enclosed documentation: ☐(check if none provided)_____

_____

Name of Person Completing This Form:_____ Signature:_____

Disclosures / Disclaimers

This evidence of insurance is provided as a matter of convenience and information only. All information included in this evidence, including but not limited to personal and real property values, locations, operations, products, data, automobile schedules, financial data and loss experience, is based on facts and representations supplied to Alliant Insurance Services, Inc. by you. This evidence does not reflect any independent study or investigation by Alliant Insurance Services, Inc. or its agents and employees.

This evidence does not add to, extend, amend, change, or alter any coverage in any actual policy of insurance you may have. All existing policy terms, conditions, exclusions, and limitations apply. For specific information regarding your insurance coverage, please refer to the policy itself. Alliant Insurance Services, Inc. will not be liable for any claims arising from or related to information included in or omitted from this evidence of insurance

Alliant embraces a policy of transparency with respect to its compensation from insurance transactions. Details on our compensation policy, including the types of income that Alliant may earn on a placement, are available on our website at **www.alliant.com**. For a copy of our policy or for any inquiries regarding compensation issues pertaining to your account you may also contact us at: Alliant Insurance Services, Inc., Attention: General Counsel, 701 B Street, 6th Floor, San Diego, CA 92101.

Analyzing insurers' over-all performance and financial strength is a task that requires specialized skills and in-depth technical understanding of all aspects of insurance company finances and operations. Insurance brokerages such as Alliant Insurance typically rely upon rating agencies for this type of market analysis. Both A.M. Best and Standard and Poor's have been industry leaders in this area for many decades, utilizing a combination of quantitative and qualitative analysis of the information available in formulating their ratings.

A.M. Best has an extensive database of nearly 6,000 Life/Health, Property Casualty and International companies. You can visit them via this **www.AmBest.com**. For additional information regarding insurer financial strength ratings visit Standard and Poor's website at **www.standardandpoors.com**.

Our goal is to procure insurance for you with underwriters possessing the financial strength to perform. Alliant does not, however, guarantee the solvency of any underwriters with which insurance or reinsurance is placed and maintains no responsibility for any loss or damage arising from the financial failure or insolvency of any insurer. We encourage you to review the publicly available information collected to enable you to make an informed decision to accept or reject a particular underwriter. To learn more about companies doing business in your state, visit the Department of Insurance website for that state.

New York Regulation 194 and General Broker Compensation Disclosure

Alliant Insurance Services, Inc. is an insurance producer licensed by the State of New York and other States. Insurance producers are authorized by their license to confer with insurance purchasers about the benefits, terms and conditions of insurance contracts; to offer advice concerning the substantive benefits of particular insurance contracts; to sell insurance; and to obtain insurance for purchasers. The role of the producer in any particular transaction typically involves one or more of these activities.

Compensation will be paid to the producer, based on the insurance contract the producer sells. Depending on the insurer(s) and insurance contract(s) the purchaser selects, compensation will be paid by the insurer(s) selling the insurance contract or by another third party. Such compensation may vary depending on a number of factors, including

the insurance contract(s) and the insurer(s) the purchaser selects. In some cases, other factors such as the volume of business a producer provides to an insurer or the profitability of insurance contracts a producer provides to an insurer also may affect compensation.

Disclosures / Disclaimers Cont.

The insurance purchaser may obtain information about compensation expected to be received by the producer based in whole or in part on the sale of insurance to the purchaser, and (if applicable) compensation expected to be received based in whole or in part on any alternative quotes presented to the purchaser by the producer, by requesting such information from the producer.

Declaration Limit Disclosure

The Declaration Limit of Liability is shared across the Named Insured(s) designated in a single Declaration. Exceptions include:

- Terrorism coverage, if purchased by a specific Named Insured, is provided on a combined basis with a sub-limit of liability that is shared across Named Insureds covered under multiple relevant Declarations.

- Flood and Earthquake sub-limits of liability, if purchased by a specific Named Insured and except as indicated below, are dedicated by Named Insured and cannot be reduced by losses sustained by other Named Insureds.

If a single Occurrence causes direct physical loss or damage to property of multiple Named Insureds covered by the same Declaration (or all relevant Declarations as respects Terrorism coverage), it is possible that the applicable shared limit of liability may be insufficient to fully indemnify the physical loss or damage as sustained by multiple Named Insureds.

In the event of a loss or accumulation of losses whereby the amount of loss exceeds the applicable shared limit of liability, the recovery available will be allocated on a proportional basis among individual Named Insureds under the same Declaration (or all relevant Declarations as respects Terrorism coverage). This allocation applies until exhaustion of limits on a per Occurrence basis and on an Annual Aggregate basis (if applicable). If a Named Insured's claim reporting is delayed, such Named Insured's recovery may be reduced or eliminated.

Furthermore, any Annual Aggregate limit of liability or sub-limit that is shared across all Named Insureds covered under a particular Declaration (or all relevant Declarations as respects Terrorism coverage) may be reduced or exhausted by the prior payment of claims arising out of separate Occurrences in the same Policy Period. As a result, it is possible that there may be no remaining limit available to pay a specific Named Insured's claim under the Policy.

To the extent actually covered, the Annual Aggregate limits are as follows:

- Accidental Contamination
- Mold/Fungus Resultant Damage
- Terrorism
- Flood and Earthquake damage to Licensed Vehicles, Unlicensed Vehicles, Contractor's Equipment and Fine Arts for Named Insured(s) that do not purchase optional dedicated Earthquake or Flood coverage

Privacy

At Alliant, one of our top priorities is making sure that the information we have about you is protected and secure. We value our relationship with you and work hard to preserve your privacy and ensure that your preferences are honored. At the same time, the very nature of our relationship may result in Alliant's collecting or sharing certain types of information about you in order to provide the products and services you expect from us. Please take the time to read our full Privacy Policy posted at **www.alliant.com** and contact your Alliant service team should you have any questions.

FATCA

The Foreign Account Tax Compliance Act (FATCA) requires the notification of certain financial accounts to the United States Internal Revenue Service. Alliant does not provide tax advice so please contact your tax consultant for your obligation regarding FATCA.

Disclosures / Disclaimers Cont.

NRRA

(Applicable if the insurance company is non-admitted)
The Non-Admitted and Reinsurance Reform Act (NRRA) went into effect on July 21, 2011. Accordingly, surplus lines tax rates and regulations are subject to change which could result in an increase or decrease of the total surplus lines taxes and/or fees owed on this placement. If a change is required, we will promptly notify you. Any additional taxes and/or fees must be promptly remitted to Alliant Insurance Services, Inc.

Changes and Developments

It is important that we be advised of any changes in your operations, which may have a bearing on the validity and/or adequacy of your insurance. The types of changes that concern us include, but are not limited to, those listed below:

- Mergers and/or acquisition and any change in business ownership, including percentages.
- Any newly assumed contractual liability, granting of indemnities or hold harmless agreements.
- Any changes in existing premises including vacancy, whether temporary or permanent, alterations, demolition, etc. Also, any new premises either purchased, constructed or occupied
- Circumstances which may require an increased liability insurance limit.
- Any changes in fire or theft protection such as the installation of or disconnection of sprinkler systems, burglar alarms, etc. This includes any alterations to the system.
- Immediate notification of any changes to a scheduled of equipment, property, vehicles, electronic data processing, etc.
- Property of yours that is in transit, unless previously discussed and/or currently insured.

Loss Notification Requirements:

Your policy will come with specific claim reporting requirements. Please make sure your organization understands these obligations and time limitations which are outlined in the attached Loss Notification documents. Contact your Alliant Service Team with any questions.

Certificates / Evidence of Insurance

A certificate is issued as a matter of information only and confers no rights upon the certificate holder. The certificate does not affirmatively or negatively amend, extend or alter the coverage afforded by a policy. Nor does it constitute a contract between the issuing insurer(s), authorized representative, producer or certificate holder.

You may have signed contracts, leases or other agreements requiring you to provide this evidence. In those agreements, you may assume obligations and/or liability for others (Indemnification, Hold Harmless) and some of the obligations that are not covered by insurance. We recommend that you and your legal counsel review these documents.

In addition to providing a certificate of insurance, you may be required to name your client or customer on your policy as an additional insured. This is only possible with permission of the insurance company, added by endorsement and, in some cases, an additional premium.

By naming the certificate holder as additional insured, there are consequences to your risks and insurance policy including:

- Your policy limits are now shared with other entities; their claims involvement may reduce or exhaust your aggregate limit.
- Your policy may provide higher limits than required by contract; your full limits can be exposed to the additional insured.
- There may be conflicts in defense when your insurer has to defend both you and the additional insured.
-

CALIFORNIA

Alliant:

IMPORTANT NOTICE:

1. The insurance policy that you have purchased is being issued by an insurer that is not licensed by the State of California. These companies are called "nonadmitted" or "surplus line" insurers.

2. The insurer is not subject to the financial solvency regulation and enforcement that apply to California licensed insurers.

3. The insurer does not participate in any of the insurance guarantee funds created by California law. Therefore, these funds will not pay your claims or protect your assets if the insurer becomes insolvent and is unable to make payments as promised.

4. The insurer should be licensed either as a foreign insurer in another state in the United States or as a non-United States (alien) insurer. You should ask questions of your insurance agent, broker, or "surplus line" broker or contact the California Department of Insurance at the toll-free number 1-800-927-4357 or internet website www.insurance.ca.gov. Ask whether or not the insurer is licensed as a foreign or non-United States (alien) insurer and for additional information about the insurer. You may also visit the NAIC's internet website at www.naic.org. The NAIC—the National Association of Insurance Commissioners—is the regulatory support organization created and governed by the chief insurance regulators in the United States.

5. Foreign insurers should be licensed by a state in the United States and you may contact that state's department of insurance to obtain more information about that insurer. You can find a link to each state from this NAIC internet website: https://naic.org/state_web_map.htm.

6. For non-United States (alien) insurers, the insurer should be licensed by a country outside of the United States and should be on the NAIC's International Insurers Department (IID) listing of approved nonadmitted non-United States insurers. Ask your agent, broker, or "surplus line" broker to obtain more information about that insurer.

7. California maintains a "List of Approved Surplus Line Insurers (LASLI)." Ask your agent or broker if the insurer is on that list, or view that list at the internet website of the California Department of Insurance: www.insurance.ca.gov/01-consumers/120-company/07- lasli/lasli.cfm.

8. If you, as the applicant, required that the insurance policy you have purchased be effective immediately, either because existing coverage was going to lapse within two business days or because you were required to have coverage within two business days, and you did not receive this disclosure form and a request for your signature until after coverage became effective, you have the right to cancel this policy within five days of receiving this disclosure. If you cancel coverage, the premium will be prorated and any broker's fee charged for this insurance will be returned to you.

D-2 (Effective January 1, 2020)

Surplus Lines Broker: Blaise Harris
Surplus Lines Licensee: Alliant Specialty Insurance Services, Inc.
Address: 325 Hillcrest Drive, Suite 250,
Thousand Oaks, CA 91360
License Number: 0558510

AmWINS:

IMPORTANT NOTICE:

1. The insurance policy that you have purchased is being issued by an insurer that is not licensed by the State of California. These companies are called “nonadmitted” or “surplus line” insurers.

2. The insurer is not subject to the financial solvency regulation and enforcement that apply to California licensed insurers.

3. The insurer does not participate in any of the insurance guarantee funds created by California law. Therefore, these funds will not pay your claims or protect your assets if the insurer becomes insolvent and is unable to make payments as promised.

4. The insurer should be licensed either as a foreign insurer in another state in the United States or as a non-United States (alien) insurer. You should ask questions of your insurance agent, broker, or “surplus line” broker or contact the California Department of Insurance at the toll-free number 1-800-927-4357 or internet website www.insurance.ca.gov. Ask whether or not the insurer is licensed as a foreign or non-United States (alien) insurer and for additional information about the insurer. You may also visit the NAIC’s internet website at www.naic.org. The NAIC—the National Association of Insurance Commissioners—is the regulatory support organization created and governed by the chief insurance regulators in the United States.

5. Foreign insurers should be licensed by a state in the United States and you may contact that state’s department of insurance to obtain more information about that insurer. You can find a link to each state from this NAIC internet website: https://naic.org/state_web_map.htm.

6. For non-United States (alien) insurers, the insurer should be licensed by a country outside of the United States and should be on the NAIC's International Insurers Department (IID) listing of approved nonadmitted non-United States insurers. Ask your agent, broker, or "surplus line" broker to obtain more information about that insurer.

7. California maintains a "List of Approved Surplus Line Insurers (LASLI)." Ask your agent or broker if the insurer is on that list, or view that list at the internet website of the California Department of Insurance: www.insurance.ca.gov/01-consumers/120-company/07-lasli/lasli.cfm.

8. If you, as the applicant, required that the insurance policy you have purchased be effective immediately, either because existing coverage was going to lapse within two business days or because you were required to have coverage within two business days, and you did not receive this disclosure form and a request for your signature until after coverage became effective, you have the right to cancel this policy within five days of receiving this disclosure. If you cancel coverage, the premium will be prorated and any broker's fee charged for this insurance will be returned to you.

D-2 (Effective January 1, 2020)

Surplus Lines Broker: Josh Ammons
Surplus Lines Licensee: AmWINS Insurance Brokerage, LLC
Address: 4725 Piedmont Row Drive, Suite 600
Charlotte, NC 28210
License Number: 0F19710

RSG Specialty:

IMPORTANT NOTICE:

1. The insurance policy that you have purchased is being issued by an insurer that is not licensed by the State of California. These companies are called "nonadmitted" or "surplus line" insurers.

2. The insurer is not subject to the financial solvency regulation and enforcement that apply to California licensed insurers.

3. The insurer does not participate in any of the insurance guarantee funds created by California law. Therefore, these funds will not pay your claims or protect your assets if the insurer becomes insolvent and is unable to make payments as promised.

4. The insurer should be licensed either as a foreign insurer in another state in the United States or as a non-United States (alien) insurer. You should ask questions of your insurance agent, broker, or "surplus line" broker or contact the California Department of Insurance at the toll-free number 1-800-927-4357 or internet website www.insurance.ca.gov. Ask whether or not the insurer is licensed as a foreign or non-United States (alien) insurer and for additional information about the insurer. You may also visit the NAIC's internet website at www.naic.org. The NAIC—the National Association of Insurance Commissioners—is the regulatory support organization created and governed by the chief insurance regulators in the United States.

5. Foreign insurers should be licensed by a state in the United States and you may contact that state's department of insurance to obtain more information about that insurer. You can find a link to each state from this NAIC internet website: https://naic.org/state_web_map.htm.

6. For non-United States (alien) insurers, the insurer should be licensed by a country outside of the United States and should be on the NAIC's International Insurers Department (IID) listing of approved nonadmitted non-United States insurers. Ask your agent, broker, or "surplus line" broker to obtain more information about that insurer.

7. California maintains a "List of Approved Surplus Line Insurers (LASLI)." Ask your agent or broker if the insurer is on that list, or view that list at the internet website of the California Department of Insurance: www.insurance.ca.gov/01-consumers/120-company/07- lasli/lasli.cfm.

8. If you, as the applicant, required that the insurance policy you have purchased be effective immediately, either because existing coverage was going to lapse within two business days or because you were required to have coverage within two business days, and you did not receive this disclosure form and a request for your signature until after coverage became effective, you have the right to cancel this policy within five days of receiving this disclosure. If you cancel coverage, the premium will be prorated and any broker's fee charged for this insurance will be returned to you.

D-2 (Effective January 1, 2020)

Surplus Lines Broker: Kieran Dempsey

Surplus Lines Licensee: RSG Specialty, LLC Doing Business As:RSG Specialty Insurance Services, LLC.

Address: 155 N. Wacker Drive, Suite 4000, Chicago, IL 60606

License Number: 0G97516

California

IMPORTANT NOTICE:

1. The insurance policy that you have purchased is being issued by an insurer that is not licensed by the State of California. These companies are called "nonadmitted" or "surplus line" insurers.

2. The insurer is not subject to the financial solvency regulation and enforcement that apply to California licensed insurers.

3. The insurer does not participate in any of the insurance guarantee funds created by California law. Therefore, these funds will not pay your claims or protect your assets if the insurer becomes insolvent and is unable to make payments as promised.

4. The insurer should be licensed either as a foreign insurer in another state in the United States or as a non-United States (alien) insurer. You should ask questions of your insurance agent, broker, or "surplus line" broker or contact the California Department of Insurance at the toll-free number 1-800-927-4357 or internet website www.insurance.ca.gov. Ask whether or not the insurer is licensed as a foreign or non-United States (alien) insurer and for additional information about the insurer. You may also visit the NAIC's internet website at www.naic.org. The NAIC-the National

Association of Insurance Commissioners-is the regulatory support organization created and governed by the chief insurance regulators in the United States.

5. Foreign insurers should be licensed by a state in the United States and you may contact that state's department of insurance to obtain more information about that insurer. You can find a link to each state from this NAIC internet website: https://naic.org/state_web_map.htm.

6. For non-United States (alien) insurers, the insurer should be licensed by a country outside of the United States and should be on the NAIC's International Insurers Department (IID) listing of approved nonadmitted non-United States insurers. Ask your agent, broker, or "surplus line" broker to obtain more information about that insurer.

7. California maintains a "List of Approved Surplus Line Insurers (LASLI)." Ask your agent or broker if the insurer is on that list, or view that list at the internet website of the California Department of Insurance: http://www.insurance.ca.gov/01-consumers/120-company/07-lasli/lasli.cfm

8. If you, as the applicant, required that the insurance policy you have purchased be effective immediately, either because existing coverage was going to lapse within two business days or because you were required to have coverage within two business days, and you did not receive this disclosure form and a request for your signature until after coverage became

effective, you have the right to cancel this policy within five days of receiving this disclosure. If you cancel coverage, the premium will be prorated and any broker's fee charged for this insurance will be returned to you.

D-2 (Effective January 1, 2020)

ALLIED WORLD
A FAIRFAX Company

BINDER CONFIRMATION

To:	Monique Escobar AmWINS Insurance Brokerage, LLC 21550 Oxnard Street, Suite 1100 Woodland Hills, CA 91367	**Date:** 06/23/2025 monique.escobar@amwins.com
		Account # 2325306
Re:	College of the Law, San Francisco - Casualty Multi-line	

Insured:	College of the Law, San Francisco	
Address:	200 McAllister Street San Francisco, CA 94102	
Policy Number:	0312-9551	
Policy Period:	**From:** 07/01/2025	**To:** 07/01/2026

Coverage is BOUND as follows:

Insurer:	Allied World National Assurance Company (Non-admitted)
Financial Rating:	AM Best Rating: A XV
Type of Insurance:	Excess Liability
Policy Form:	GL 00127 00 (09/07)
Policy Trigger:	Occurrence
Retro Date:	N/A
Defense Type	Defense costs do erode the limits listed below

Allied World Limits	$10,000,000	**Each Occurrence**
	$10,000,000	**Other Aggregate (Where Applicable)**
	Attachment Point: *(excess of primary & SIR amounts)*	
	$30,000,000	**Each Occurrence – GLX**
	$30,000,000	**Other Aggregate (Where Applicable) – GLX**
	$25,000,000	**Each Claim - ELL**
	$25,000,000	**Other Aggregate (Where Applicable) - ELL**

Advanced Premium:	$135,000 Flat
TRIA Charge:	$3,500 (Not included above. Coverage rejected by insured)
Minimum Earned %:	25%
Premium Payment:	$135,000
Subject to Audit:	Flat

This BINDER contemplates the following primary underlying insurance and/or retained amounts as listed in the attached excerpt from United Educators Insurance binder:

Excess Follow Form with Limitations - (GLX)	Layer:	**Followed Layer**
	Carrier:	**United Educators Insurance**
	Effective Date:	**July 1, 2025**
	Expiration Date:	**July 1, 2026**
	Policy #:	**B57-34Y**
	Policy Form:	**GLX 05-2021**
	Policy Limits	
	$30,000,000	**Each Occurrence**
	$30,000,000	**Aggregate (Where Applicable)**
	Which is further excess of	
	$1,000,000	**Each Occurrence Self Insured Retention**
	Defense Type:	**Defense costs erode the Policy Limits and the Self Insured Retentions listed above**

Educators Legal Liability - Claims Made Basis	Layer:	**Followed Layer**
	Carrier:	**United Educators Insurance**
	Effective Date:	**July 1, 2025**
	Expiration Date:	**July 1, 2026**
	Policy #:	**B57-34Y**
	Policy Form:	**ELL 05-2021**
	Policy Limits	
	$25,000,000	**Each Claim**
	$25,000,000	**Aggregate**
	Which is further excess of	
	$125,000	**Each Occurrence Self Insured Retention**
	Defense Type:	**Defense costs erode the Policy Limits and the Self Insured Retentions listed above**

Applicable AWAC Endorsements:

Form # / Edition	Title
	All applicable mandatory state endorsements
GL 00140 00 (12/11)	Declarations
00164 (11/05)	Non-Followed Terms and Conditions of the Followed Policy
00174 (11/05)	Non-Followed Endorsements of the Followed Policy
00188 (11/05)	Previously Notified Or Known Event Exclusion
00241 (11/05)	Asbestos Exclusion
00275 (03/12)	Service of Suit
GL 00117 00 (03/21)	Policyholder Disclosure Statement Under The Terrorism Risk Insurance Act
GL 00121 00 (08/07)	Non Drop Down Endorsement
GL 00267 00 (01/15)	Exclusion of Certified Acts of Terrorism and Other Acts of Terrorism
GL 00323 00 (05/09)	Schedule of Underlying Insurance
GL 00390 00 (07/13)	Claims Reporting Amendment (Amendment Of Condition F.)
GL 00575 00 (06/18)	Neurodegenerative Injury Exclusion
GL 00621 00 (07/20)	Communicable Disease And Infectious Agent Exclusion
GL 00656 00 (03/21)	Economic Or Trade Sanctions
GL 00717 00 (07/22)	Perfluoroalkyl Or Polyfluoroalkyl Substance (PFAS) Exclusion
GL 00731 00 (02/24)	Biometric Identifiers, Biometric Information And Data Privacy Exclusion
IL 00017 04 (11/08)	California - Suits Involving a Surplus Lines Broker - Remedies
Z-XSFF 00275 00 (05-21)	Sexual Misconduct Claims-Made and Reported Endorsement (With Retained Limit)
Z-XSFF 00277 00 (05-21)	Policy Aggregate Limits (Educators Legal Liability and All Other Liability - Not Including Auto Liability)
Z-XSFF 00281 00 (05-21)	Choice of Law, Service of Suit, and Arbitration Endorsement

BINDER TERMS AND CONDITIONS:

1. This binder letter is predicated upon the understanding that the submitted information is accurate and the loss information includes total incurred losses ground up and that the losses have not been capped. Binding of coverage is strictly conditioned upon no material change in the risk. A material change includes, without limitation, the reporting to Allied World or another insurer of a claim or circumstance that might give rise to a claim between the date of this binder and the policy inception date. In the event of such a material change in risk, Allied World may, in its sole discretion, amend or withdraw this binder.

2. Any restrictive policy terms and conditions that apply to underlying policies that are in excess of the Followed Policy but underlying to the Allied World Excess policy will also apply to the Allied World Excess limit of liability. Any additional endorsements to the Allied World Policy will be determined upon review of the above-required documentation.

3. *(Taxes*)
   The premium payable to Allied World does not include any amount with respect to Surplus Lines Taxes and/or fees. Under the terms of this proposal, it is the obligation of the Insured to be liable for and pay any Surplus Lines Taxes and/or fees either itself or through its broker. Allied World Assurance Company (U.S.), Inc. will be indemnified and fully reimbursed by the Insured for any premium taxes (and costs associated with collection, including legal costs) in the event the Insured or its broker fails to pay.
4. Please advise your client that Allied World cannot release Policy documentation without:
   - A complete copy of the Followed Policy (including all endorsements and schedules), inclusive of underlying layers or other documentation.

SUBJECTIVITIES:

A. This BINDER is subject to receipt, review and acceptance of the following items:

   1. Complete Copies of Underlying Policies

B. This **BINDER** is subject to Allied World's receipt and favorable review of the following:

   1. Complete copy of signed binders (including terms and conditions) for the Followed Policy **and** for all underlying excess policies attaching between the Followed Policy and the Allied World policy.
   2. Specimen copies of any underlying endorsements or policy forms as required by Allied World.

C. Please also note that Binding is subject to payment of premium within 30 calendar days of the commencement of the Policy Period. If the premium or proof of payment thereof is not received by Allied World within 30 calendar days of the commencement of the Policy Period, the Policy will be canceled automatically retroactive to the commencement of the Policy Period.

Thank you for the opportunity to **BIND** this **account.**

POLICYHOLDER DISCLOSURE STATEMENT
UNDER THE
TERRORISM RISK INSURANCE ACT

The **insured** is hereby notified that under the federal Terrorism Risk Insurance Act, as amended, (the "Act"), the **insured** has a right to purchase insurance coverage for **losses** arising out of an Act of Terrorism, as defined in Section 102(1) of the Act. The term "act of terrorism" means any act certified by the Secretary of the Treasury, in consultation with the Secretary of Homeland Security and the Attorney General of the United States to be an act of terrorism; to be a violent act or an act that is dangerous to human life, property, or infrastructure; to have resulted in damage within the United States, or outside of the United States in case of certain air carriers or vessels or the premises of a United States mission; and to have been committed by an individual or individuals as part of an effort to coerce the civilian population of the United States or to influence the policy or affect the conduct of the United States Government by coercion. The **insured** should read the Act for a complete description of its coverage. The Secretary's decision to certify or not to certify an event as an Act of Terrorism covered by the Act is final and not subject to review.

Coverage provided by this **policy** for **losses** caused by a Certified Act of Terrorism may be partially reimbursed by the United States Government under a formula established by federal law. However, the **insured's policy** may contain other exclusions that might affect coverage, such as an exclusion for nuclear events. Under the formula, beginning on January 1, 2020, the United States Government will generally reimburse 80% of covered terrorism **losses** exceeding a statutorily established deductible that must be met by the **company**, and which deductible is based on a percentage of the **company's** direct earned premiums for the year preceding the Certified Act of Terrorism.

Be advised that the Terrorism Risk Insurance Act, as amended, contains a $100 billion cap on all losses resulting from Certified Acts of Terrorism. If aggregate insured losses attributable to Certified Acts of Terrorism exceed $100 billion in a calendar year, the United States Government shall not make any payment for any portion of the amount of such loss that exceeds $100 billion. If aggregate insured losses attributable to Certified Acts of Terrorism exceed $100 billion in a calendar year and the **company** has met its deductible under the Act, the **company** shall not be liable for payment of any portion of the losses that exceeds $100 billion, and in such case, insured losses up to that amount are subject to pro rata allocation in accordance with procedures established by the Secretary of the Treasury.

Coverage for "insured losses" as defined in the Act is subject to the coverage terms, conditions, amounts and limits in this **policy** applicable to **losses** arising from events other than Certified Acts of Terrorism.

The **insured** should know that under federal law, the **insured** is not required to purchase coverage for **losses** caused by Certified Acts of Terrorism.

Please indicate the selection of the **insured** below.

___The **insured** hereby elects to purchase coverage in accordance with the Act for a premium of $3,500.00.

___The **insured** hereby rejects coverage and accepts reinstatement of the exclusion in accordance with the Act.

College of the Law, San Francisco

_____
Signature of **Insured**

0312-9551

_____
Print/Title

_____
Date

GL 00117 00 (03/21)

EVIDENCE OF CRIME INSURANCE

ISSUE DATE (MM/DD/YY)
07/02/2025

THIS EVIDENCE OF COMMERCIAL PROPERTY INSURANCE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE ADDITIONAL INTEREST NAMED BELOW. THIS EVIDENCE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS EVIDENCE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE ADDITIONAL INTEREST.

PRODUCER

ALLIANT INSURANCE SERVICES, INC.
18100 VON KARMAN AVENUE, 10TH FLOOR
IRVINE, CA 92612
PH(949) 756-0271 / FAX (949) 756-2713
LICENSE NO. 0C36861

CODE **SUB-CODE**

COMPANY
National Union Fire Insurance Company of Pittsburgh, PA (AIG)

INSURED **ALLIANT CRIME INSURANCE PROGRAM (ACIP)**
CRIME POLICY PARTICIPANT:
College of the Law, San Francisco
200 McAllister Street
San Francisco, CA 94102

EVIDENCE NUMBER

POLICY NUMBER
ACIP2526

EFF DATE (MM/DD/YYYY)	**EXP DATE** (MM/DD/YYYY)	CONT. UNTIL TERMINATED IF CHECKED	☐
07/01/2025	07/01/2026		

THIS REPLACES PRIOR EVIDENCE DATED:

PROPERTY INFORMATION

THE POLICIES OF INSURANCE LISTED ABOVE HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS EVIDENCE OF PROPERTY INSURANCE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

CRIME COVERAGE INFORMATION

COVERAGE / PERILS / FORMS	AMOUNT OF INSURANCE	DEDUCTIBLE
EMPLOYEE THEFT INCLUDING FAITHFUL PERFORMANCE OF DUTY FORGERY OR ALTERATION INSIDE PREMISES THEFT OF MONEY AND SECURITIES INSIDE PREMISES ROBBERY AND SAFE BURGLARY OTHER PROPERTY OUTSIDE THE PREMISES COMPUTER FRAUD FUNDS TRANSFER FRAUD MONEY ORDERS AND COUNTERFEIT PAPER CURRENCY	$3,000,000	$25,000

REMARKS (INCLUDING SPECIAL CONDITIONS)

ISSUED FOR PURPOSES OF EVIDENCING CRIME INSURANCE COVERAGE UNTIL RECEIPT OF COMPANY POLICY

SUBJECT TO POLICY TERMS, CONDITIONS AND EXCLUSIONS.

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

ADDITIONAL INTEREST

NAME AND ADDRESS

EVIDENCE OF INSURANCE

NATURE OF INTEREST

☐ **MORTGAGEE** ☐ **ADDITIONAL INSURED**

☐ **LOSS PAYEE** ☒ **(OTHER) EVIDENCE OF INSURANCE**

SIGNATURE OF AUTHORIZED AGENT OF COMPANY

PUBLIC RISK INNOVATION, SOLUTIONS, AND MANAGEMENT
EXCESS WORKERS' COMPENSATION PROGRAM
MEMORANDUM OF COVERAGE
DECLARATIONS

ITEM 1: COVERED PARTY: College of the Law, San Francisco

ITEM 2: MEMORANDUM PERIOD: From July 1, 2025 to July 1, 2026, 12:01 a.m. local time of the **Covered Party** as stated herein

ITEM 3: STATE: California

ITEM 4: TOWER PARTICIPATION: Educational Tower I

ITEM 5: COVERAGE PROVIDED BY: Public Risk Innovation, Solutions, and Management (PRISM) with reinsurance provided by Great American Insurance Company and Safety National Casualty Corporation

ITEM 6: RETENTION AND INDEMNITY:

A. COVERED PARTY'S RETENTION:

$ 250,000 each **occurrence**

B. LIMIT OF INDEMNITY:

Statutory		Workers Compensation each accident or each employee for disease
$ 4,750,000	excess of $ 250,000	Employers Liability

PRISM's limit of indemnity, as set forth in ITEM 5.B includes pooled limits that apply to all Members and all **Covered Parties** combined in the Tower shown in ITEM 4 for all **losses** as a result of any one **occurrence**.

ITEM 7: MEMORANDUM NUMBER: PRISM-PE 25 EWC-81

ITEM 8: ESTIMATED PAYROLL: $ 41,027,783

ITEM 9: DEPOSIT PREMIUM: $ 121,793 (inclusive of all layers & fees)

This premium is adjustable based on final audited payroll

ITEM 10: FORMS AND ENDORSEMENTS ATTACHED AT INCEPTION: EWC MOC 7/1/2022, Endorsement No. U-1, U-2, U-3, U-4, U-5

Countersigned by: _____ **Issue Date:** June 27, 2025

Authorized Representative
Public Risk Innovations, Solutions, and Management

PUBLIC RISK INNOVATION, SOLUTIONS, AND MANAGEMENT (PRISM)

EXCESS WORKERS' COMPENSATION PROGRAM
MEMORANDUM OF COVERAGE

Public Risk Innovation, Solutions, and Management (hereinafter PRISM) agrees with the **Covered Party** named in the Declarations made a part hereof, in consideration of the payment of the premium and subject to all of the terms of this Memorandum, as follows:

COVERAGE AGREEMENTS

I. APPLICATION OF MEMORANDUM: This Memorandum applies to **loss** sustained by the **Covered Party** because of liability imposed upon the **Covered Party** by:

A. The **Workers' Compensation Act** of California or the **Workers' Compensation Act** of any state other than California, provided that California is the injured **employee's** normal state of employment or residence, or

B. "Employers' Liability**"**

on account of **bodily injury or occupational disease** sustained by **employees** of the **Covered Party**, while engaged in operations of the **Covered Party**, as a result of **occurrences** taking place during the coverage period and while this Memorandum is in force.

The indemnity afforded by this Memorandum under Coverage Agreement I.B. for **loss** because of liability imposed by **"**Employers' Liability**"** applies only as respects such operations in California including **employees** who are regularly engaged in such operations in California but who may be temporarily outside California in connection with such operations. As respects liability imposed by "Employers' Liability", PRISM shall have no obligation to indemnify the **Covered Party** for damages imposed in any lawsuit brought in, or any judgment rendered by, any court outside of the United States of America, its territories or possession, or Canada, or to any action on such judgment wherever brought.

PRISM's liability under Coverage Agreement I.B. includes **bodily injury** or **occupational disease** to the master and members of the crew of a vessel, subject to the following:

A. The **bodily injury** or **occupational disease** must occur in the territorial limits of, or the operation of a vessel sailing directly between the ports of the Continental United States of America, Alaska, Hawaii, or Canada.

B. This coverage does not apply to:

1. bodily injury or **occupational disease** covered by a

protection and indemnity coverage or similar policy issued to or on behalf of the **Covered Party**

2. The duty to provide transportation, wages, and maintenance.

II. RETENTION AND INDEMNITY: As respects **loss,** which the **Covered Party** sustains as a result of each **occurrence**, the **Covered Party** shall retain **loss** in the amount of the **Covered Party's** Retention specified in the Declarations, and PRISM agrees to indemnify the **Covered Party** against **loss** in excess of such Retention. Notwithstanding the application of this Memorandum to **loss** sustained by the **Covered Party** under Coverage Agreements I.A. or I.B., and regardless of the number of entities named in the Declarations, or otherwise qualifying as **Covered Parties**, the maximum amount of the **Covered Party's** Retention and the maximum limit of PRISM's indemnity hereunder shall not exceed the amounts specified in the Declarations.

DEFINITIONS

Wherever used in this Memorandum, the following definition of terms shall apply:

I. **BODILY INJURY:** The term **bodily injury** shall include death resulting therefrom but shall not include **occupational disease**.

II. **COMMUNICABLE DISEASE** shall mean a disease caused by an infectious organism, which is transmissible from one source to another, directly or indirectly.

III. **COVERED PARTY** shall include all entities named in the Declarations and any related "employer" as defined by any applicable **Workers' Compensation Act**.

IV. **EMPLOYEE**: The term **employee** shall mean any person performing work which renders the **Covered Party** liable under any **Workers' Compensation Act** for **bodily injury** or **occupational disease** sustained by such person.

V. **JOINT POWERS AGREEMENT** or **AGREEMENT** shall mean the Joint Powers Agreement, as amended, creating PRISM.

VI. **LOSS:** The term **loss** shall mean only such amounts as are actually paid by the **Covered Party** as benefits under the applicable **Workers' Compensation Act**, or in payment of amounts imposed upon the **Covered Party** by "Employers' Liability", in settlement of claims for such benefits or damages, or satisfaction of awards or judgments for such benefits and damages, including court costs, interest upon awards or judgments, and allocated investigation, adjustment and legal expenses, but the term **loss** shall not include as expenses, salaries paid to **employees** of the **Covered Party**, nor fees and retainers paid to any service organization.

Notwithstanding the foregoing, **loss** does not include any amounts paid by the **Covered Party** as benefits, or in payment of amounts imposed upon the **Covered Party** by Employers' Liability, deriving solely from any **Covered Party's** enactment, resolution or other act establishing either a presumption of work- related illness or

injury or any other expansion of benefits beyond those prescribed by the applicable **Workers' Compensation Act**. Despite any such enactment resolution or act, the **Covered Party** shall retain the burden of establishing **loss** within the Memorandum of Coverage.

VII. **OCCUPATIONAL DISEASE**: The term **occupational disease** shall include death resulting therefrom and cumulative injuries.

VIII. **OCCURRENCE**: (A) All **bodily injury** sustained by one or more **employees**, as a result of a single accident or event, shall be deemed to arise from a single **occurrence**. (B) **Occupational disease** sustained by each **employee** shall be deemed to arise from a separate **occurrence**, and the **occurrence** shall be deemed to take place on the last day of the last exposure, in the employment of the **Covered Party**, to conditions causing or aggravating the disease or the date upon which the employee first suffered disability and either knew, or in the exercise of reasonable diligence should have known, that such disability was caused by his or her employment with the **Covered Party**, whichever comes first. (C) All **occupational disease** sustained by one or more **employees** as a result of an outbreak of the same **communicable disease** shall be deemed to arise from a single **occurrence.** An outbreak of the same **communicable disease** that spans more than one coverage period shall be deemed to take place during the first such coverage period.

IX. **WORKERS' COMPENSATION ACT:** The term **Workers' Compensation Act** shall include any separate occupational disease act, but shall not include the non-occupational disability benefit provisions of any such act. The term **Workers' Compensation Act** includes the United States Longshore and Harbor Workers Compensation Act (33 USC Sections 901-950). Coverage for **loss** shall be limited, by amount and time of payment, to the benefits, which would be available under the **Workers' Compensation Act** of the state where the injured employee is normally employed, if that law applied.

EXCLUSIONS

Liability under Coverage Agreement I.A. does not apply to:

I. The **Covered Party's** obligation to pay salary in lieu of temporary disability benefits as required by Labor Code Section 4850 or the **Covered Party's** obligation to pay wages or salary as required by Education Code Sections 44984 and 45192, except to the extent that the **Covered Party** would be obligated to pay temporary disability benefits if Labor Code Section 4850 or Education Code Sections 44984 and 45192 did not apply;

II. The **Covered Party's** obligations pursuant to Labor Code Section 4856;

III. Punitive or Exemplary Damages, fines or penalties assessed against or imposed upon the **Covered Party**:

A. On account of **bodily injury** or **occupational disease** sustained by any

employee; or

B. On account of the conduct of the **Covered Party** or any of its agents (i) in the investigation, trial or settlement of any claim for benefits under the applicable **Workers' Compensation Act** or for damages at law, or (ii) in failing to pay or delaying the payment of any such benefits or damages; or

C. On account of violation of any statute or regulation; or

D. On account of **bodily injury** or **occupational disease** intentionally caused or aggravated by the **Covered Party**; or

E. On account of **bodily injury** arising out of termination of employment; or

F. On account of **bodily injury** arising out of the coercion, demotion, reassignment, discipline, defamation, harassment or humiliation of, or discrimination against any **employee**.

Liability under Coverage Agreement I.B. does not apply to:

I. Liability assumed by the **Covered Party** under any contractual agreement;

II. **Bodily injury** or **occupational disease** to an employee while employed in violation of law with the actual knowledge of the **Covered Party**;

III. Any obligation imposed by a workers' compensation, occupational disease, unemployment compensation, or disability benefits law, or any similar law;

IV. **Bodily injury** or **occupational disease** intentionally caused or aggravated by the **Covered Party**;

V. Loss arising out of the coercion, criticism, demotion, evaluation, reassignment, discipline, defamation, harassment, humiliation, discrimination against or termination of any **employee** or any personnel practices, policies, acts or omissions;

VI. Fines or penalties assessed against or imposed upon the **Covered Party** on account of violation of any statute or regulation;

VII. Loss arising out of operations for which the **Covered Party** has violated or failed to comply with any Workers' Compensation Law;

VIII. Loss arising out of operations for which the **Covered Party** has rejected any Workers' Compensation Law;

IX. Punitive or Exemplary Damages, fines or penalties assessed against or imposed upon the **Covered Party**.

CONDITIONS

I. PREMIUMS: The Board of Directors of PRISM shall assess the premium for the Excess Workers' Compensation Program to participating **Covered Parties**. Such premiums shall be calculated in accordance with Article 14 of the **Joint Powers Agreement**.

II. VOLUNTEERS: This Memorandum shall apply to **loss** on account of **bodily injury** or **occupational disease** sustained by volunteer workers while acting within the scope of their duties for or on behalf of the **Covered Party,** provided that, prior to the **occurrence**, the Governing Board of the **Covered Party** has adopted a resolution as provided in Division 4, Part 1, Chapter 2, Article 2, of the California Labor Code, declaring such volunteer workers to be **employees** of the **Covered Party** for purposes of the **Workers' Compensation Act**; or provided that such volunteer workers are statutorily deemed by the **Workers' Compensation Act** to be **employees** for the purposes of workers' compensation.

III. ADMINISTRATION AND REPORTING OF CLAIMS: The **Covered Party** shall be responsible for the investigation, settlement, defense or appeal of any claim made or suit brought, or proceeding instituted against the **Covered Party**, and the **Covered Party** shall have the duty to give immediate notice to PRISM upon learning of any of the following:

A. Any **occurrence** for which total incurred (paid to date plus remaining reserves) exceeds 50% of the **Covered Party's** Retention;

B. Any **occurrence** which causes serious injury to two or more employees;

C. Any **occurrence** which results in:

1. A fatality;
2. An amputation of a major extremity;
3. Any serious head injury (including skull fracture or loss of sight of either or both eyes);
4. Any injury to the spinal cord;
5. Any second or third degree burn of 25% or more of the body;
6. A permanent total disability as defined in the **Workers' Compensation Act** of the State of California;

D. The reopening of any case in which a further award might exceed 50% of the **Covered Party's** retention.

The **Covered Party** shall not make any voluntary settlement or voluntarily make a lump sum payment or commutation or one-time payment in lieu of periodic indemnity payments to **employees** or their dependents involving **loss** to PRISM except with the prior written consent of PRISM.

The **Covered Party** shall promptly forward to PRISM any requested information on

individual **occurrences** claims, or cases, and shall provide such information to PRISM within thirty (30) days in a form satisfactory to PRISM, including the amounts paid and the estimated future payments or outstanding reserves.

PRISM, at its own election and expense, shall have the right to participate with the **Covered Party** in, or to assume in the name of the **Covered Party**, control over the investigation, settlement, defense, or appeal of any claim, suit, or proceeding, which might involve liability of PRISM.

IV. SERVICE ORGANIZATION: As a condition precedent to recovery hereunder, it is agreed that the **Covered Party** will engage one or more service organizations and/or in-house staff acceptable to PRISM to perform on behalf of the **Covered Party**, and without charge to PRISM, such services as may be acceptable to PRISM during the currency of this Memorandum and until the final settlement of all claims arising out of **occurrences** which take place while this Memorandum is in force. The performance of such services shall not constitute any undertaking on behalf of PRISM, nor relieve the **Covered Party** of any of its obligations under the terms of this Memorandum.

V. ASSISTANCE AND COOPERATION: In the event PRISM elects to participate with the **Covered Party** in, or to assume in the name of the **Covered Party**, control over the investigation, defense, or appeal of any claim, suit, or proceeding, the **Covered Party** shall cooperate to the fullest extent with PRISM and its representatives.

Upon PRISM's request, the **Covered Party** shall direct its service organization and/or other representatives to cooperate with and assist PRISM in all matters relative to such investigation, settlement, defense, or appeal.

If PRISM elects to assume control as described above, PRISM shall give written notice of such election to the **Covered Party**. Upon receipt of such written notice, the **Covered Party** shall not, except at its own cost, voluntarily make any payment, assume any obligation, or incur any expense other than such immediate medical or other services at the time of injury as are required by the **Workers' Compensation Act** or such immediate medical and surgical relief as may become imperative at the time of an **occurrence**.

VI. LOSS PAYABLE: PRISM shall pay any **loss** for which it may be liable under this Memorandum in the following manner:

A. As respects Coverage Agreements I.A., payment shall first be made by the **Covered Party** in accordance with the provisions of the **Workers' Compensation Act**, and PRISM shall reimburse the **Covered Party** for such **loss** periodically, at intervals of not less than one (1) month, upon receipt from the **Covered Party** of proofs of payment which is acceptable to PRISM in content and form.

B. As respects Coverage Agreement I.B., liability under this Memorandum with respect to any **occurrence** shall not attach unless and until PRISM's

liability shall have been fixed and rendered certain either by final judgment against the **Covered Party** after actual trial or by written agreement of the **Covered Party**, the claimant, and PRISM. Such **losses** shall be due and payable within thirty (30) days after they are respectively claimed and proven in conformity with this Memorandum.

VII. PAYMENTS THE **COVERED PARTY** MUST MAKE: The **Covered Party** shall be responsible for any payments in excess of the benefits regularly provided by the **Workers' Compensation Act**, including but not limited to those required because:

A. of serious and willful misconduct on the part of the **Covered Party**;

B. the **Covered Party** knowingly employs an employee in violation of the law;

C. the **Covered Party** fails to comply with a health or safety law or regulation; however, this does not apply to recommendations promulgated by the Joint Commission for Accreditation of Health;

D. of discharge, coercion, or discrimination against any employee in violation of the **Workers' Compensation Act**;

E. of claims relating to or in any way arising out of California Labor Code Section 132(a);

F. of the unreasonable delay or failure to make payments of compensation by or on behalf of the **Covered Party**, including the legal fees associated with defending resulting claims or suits;

G. the **Covered Party** violates or fails to comply with the **Workers' Compensation Act**.

If PRISM makes any payments on behalf of the Covered Party in excess of the benefits regularly provided by the Workers' Compensation Act, the Covered Party will reimburse PRISM promptly.

VIII. SUBROGATION: In the event of any payment under this Memorandum, PRISM shall be subrogated, to the extent of such payment, to all the **Covered Party's** rights of recovery therefore, and the **Covered Party** shall execute all papers required and shall do everything that may be necessary to secure such rights. Any amount recovered as a result of such proceedings, together with all expenses necessary to the recovery of any such amount shall be apportioned as follows: PRISM shall first be reimbursed to the extent of its actual payment hereunder. If any balance then remains, said balance shall be applied to reimburse the **Covered Party**. The expenses of all proceedings necessary to the recovery of such amount shall be apportioned between the **Covered Party** and PRISM in the ratio of their respective recoveries as finally settled. If there should be no recovery in proceedings instituted solely on the initiative of PRISM, the expenses thereof shall be borne by PRISM.

IX. INSPECTION AND AUDIT: PRISM shall be permitted but not obligated to inspect the **Covered Party's** operations at any time. Neither PRISM's right to make inspections nor the making thereof nor any report thereon shall constitute an undertaking on behalf of or for the benefit of the **Covered Party** or others to determine or warrant that such operations are safe or harmful, or are in compliance with any law, rule or regulation. PRISM may examine and audit the **Covered Party's** books and records at any time during the currency hereof and until three (3) years after the final settlement of all claims or payments made on account of accident or disease occurring during the term of this Memorandum as far as such books and records relate to the subject matter of this Memorandum.

X. OTHER COVERAGE: If the **Covered Party** has other coverage against a **loss** covered by this Memorandum, PRISM's coverage shall apply in excess of any other coverage.

XI. BANKRUPTCY AND INSOLVENCY: In the event of the bankruptcy or insolvency of the **Covered Party** or any entity comprising the **Covered Party**, PRISM shall not be relieved thereby of the payment of any claims under this Memorandum because of such bankruptcy or insolvency.

XII. ASSIGNMENT: No assignment of the **Covered Party's** interest hereunder shall be binding upon PRISM unless its consent is endorsed hereon.

XIII. NOTICE OR PAYMENT: If more than one entity qualifies as a **Covered Party** under the definition of **Covered Party** or by endorsement to this Memorandum, all notices, stipulations and payments to or by the entity first named in the Declarations shall be binding upon all other **Covered Parties**.

XIV. CHANGE OR WAIVER: The terms of this Memorandum shall not be waived or changed except by endorsement issued to form a part hereof, signed by a duly authorized representative of PRISM.

XV. CANCELLATION: This Memorandum may be canceled by the **Covered Party** only at the end of the Memorandum Period and pursuant to the provisions of Article 20(b) of the **Joint Powers Agreement**. PRISM may cancel this agreement pursuant to the provisions of Article 21 (a)(1) and (a)(2) of the **Joint Powers Agreement** or PRISM's invoice and premium payment policy as established by the Board of Directors. This Memorandum does not apply to any **loss** as a result of any **occurrences** taking place at or after the effective date of any such cancellation.

Any return of unearned premium in the event of cancellation by PRISM shall be determined pursuant to Article 22 of the **Joint Powers Agreement.**

XVI. ACCEPTANCE: By acceptance of this Memorandum, the **Covered Party** agrees that each of the persons, firms or organizations named in the Declarations as the **Covered Party** is, or upon learning of the necessity therefore will become, qualified to operate with the permission of the proper authorities as a self-insurer under the **Workers' Compensation Act** of California; that the statements in the application for this Memorandum are the **Covered Party's** agreements and representations; that this Memorandum embodies all agreements existing between the **Covered Party** and PRISM or any of its agents relating to this coverage; and that full compliance by the **Covered Party** with all the terms of this Memorandum is a condition precedent to PRISM's liability hereunder.

XVII. CONFORMANCE WITH **WORKERS' COMPENSATION ACT**: Any term of this Memorandum which conflicts with any provision of the California **Workers' Compensation Act** is changed by this provision to conform to said law.

XVIII. CARVE OUTS: In the event a **Covered Party** is considering entering into a labor management agreement that establishes an alternative dispute resolution process pursuant to Labor Code Section 3201.7, with one or more bargaining unit(s), to amend any portion of the Workers' Compensation claims process, that proposed carve out agreement must be submitted to PRISM for review prior to implementation. Failure to provide such documentation prior to implementation may result in the benefits provided under such carve out agreement, and any expenses related thereto, not being covered under this Memorandum of Coverage.

IN WITNESS WHEREOF, PRISM has caused this Memorandum to be executed and attested, but this Memorandum shall not be valid unless countersigned by an authorized representative of PRISM.

ENDORSEMENT NO. U-1

PUBLIC RISK INNOVATION, SOLUTIONS, AND MANAGEMENT (PRISM)
EXCESS WORKERS' COMPENSATION

WAR AMENDATORY ENDORSEMENT

It is understood and agreed that this Memorandum shall not apply to **loss** directly or indirectly caused by, resulting from or in connection with war, invasion, acts of foreign enemies, hostilities or warlike operations (whether war be declared or not), civil war, rebellion, revolution, insurrection, civil commotion assuming the proportions of or amounting to an uprising, military or usurped power, regardless of any other cause or event contributing concurrently or in any sequence to the **loss**.

This Memorandum shall also not apply to **loss** directly or indirectly caused by, resulting from or in connection with any action taken in controlling, preventing, suppressing or in any way relating to the above.

It is further agreed that nothing herein shall act to increase PRISM's limit of indemnity.

This endorsement is part of the Memorandum of Coverage and takes effect on the effective date of the Memorandum of Coverage unless another effective date is shown below. All other terms and conditions remain unchanged.

Effective Date: **Memorandum No.:** PRISM 25 EWC-00

Issued to: ALL MEMBERS

Issue Date: June 27, 2025

Authorized Representative
Public Risk Innovation, Solutions and Management

ENDORSEMENT NO. U-2

PUBLIC RISK INNOVATION, SOLUTIONS, AND MANAGEMENT (PRISM)
EXCESS WORKERS' COMPENSATION

WAIVER OF SUBROGATION ENDORSEMENT

It is understood and agreed that Section VIII. **SUBROGATION** of the **CONDITIONS** section of the Memorandum of Coverage is deleted in its entirety and replaced by the following:

VIII. SUBROGATION: In the event of any payment under this Memorandum, PRISM shall be subrogated, to the extent of such payment, to all the **Covered Party's** rights of recovery therefore, and the **Covered Party** shall execute all papers required and shall do everything that may be necessary to secure such rights. Any amount recovered as a result of such proceedings, together with all expenses necessary to the recovery of any such amount shall be apportioned as follows: PRISM shall first be reimbursed to the extent of its actual payment hereunder. If any balance then remains, said balance shall be applied to reimburse the **Covered Party**. The expenses of all proceedings necessary to the recovery of such amount shall be apportioned between the **Covered Party** and PRISM in the ratio of their respective recoveries as finally settled. If there should be no recovery in proceedings instituted solely on the initiative of PRISM, the expenses thereof shall be borne by PRISM.

However, in the event of any loss payment under this Memorandum for which you have waived the right of recovery in a written contract entered into prior to the loss, we hereby agree to also waive our right of recovery but only with respect to such loss.

It is further agreed that nothing herein shall act to increase PRISM's limit of indemnity.

This endorsement is part of the Memorandum of Coverage and takes effect on the effective date of the Memorandum of Coverage unless another effective date is shown below. All other terms and conditions remain unchanged.

Effective Date: **Memorandum No.:** PRISM 25 EWC-00

Issued to: ALL MEMBERS

Issue Date: June 27, 2025

Authorized Representative
Public Risk Innovation, Solutions and Management

ENDORSEMENT NO. U-3

PUBLIC RISK INNOVATION, SOLUTIONS, AND MANAGEMENT (PRISM) EXCESS WORKERS' COMPENSATION

OCCURRENCES INVOLVING MULTIPLE COVERED PARTIES

It is understood and agreed that this Memorandum shall apply, as follows, to **occurrences** involving multiple Excess Workers' Compensation Program **Covered Parties**:

For an **occurrence** in which multiple **Covered Parties** exceed their retention specified in the Declarations of this Memorandum, the combined **Losses** will be considered one **occurrence** for each Tower under the Excess Workers' Compensation Program.

Each **Covered Party**'s **Losses** will collectively determine the **occurrence** period as outlined in the definition of **occurrence**. This may result in delayed reimbursement to each **Covered Party** until the **occurrence** periods can be confirmed at a later date, and contrary to the terms listed in **CONDITIONS, Part VI: Loss Payable**.

Should the maximum Program limits apply, the **Loss** to each **Covered Party** within a particular Tower involved in the **occurrence** will be evaluated five years from the end of the coverage period in which the **Loss** occurs, and will be used as the "final **Loss** evaluation" for determination of each **Covered Party's** pro rata percentage share of the "final **Loss** evaluation". The retention specified for each **Covered Party** in the Declarations of this Memorandum issued will be used as part of this determination. This may result in each **Covered Party** not receiving full reimbursement for their **Loss**.

It is further agreed that nothing herein shall act to increase PRISM's limit of indemnity.

This endorsement is part of the Memorandum of Coverage and takes effect on the effective date of the Memorandum of Coverage unless another effective date is shown below. All other terms and conditions remain unchanged.

Effective Date: **Memorandum No.:** PRISM 25 EWC-00

Issued to: ALL MEMBERS

Issue Date: June 27, 2025

Gina Dean

Authorized Representative
Public Risk Innovation, Solutions and Management

ENDORSEMENT NO. U-4

PUBLIC RISK INNOVATION, SOLUTIONS, AND MANAGEMENT (PRISM)
EXCESS WORKERS' COMPENSATION

OFF-DUTY, OUT-OF-STATE PEACE OFFICER INJURY (AB 1749) ENDORSEMENT

It is understood and agreed that this Memorandum shall not apply to **bodily injury** or **occupational disease** sustained by a peace officer who was at the time of the **occurrence**:

a. off-duty,
b. not acting under the immediate direction of his or her employer, and
c. outside the state of California.

However, this exclusion shall not apply to **bodily injury** or **occupation disease** sustained by a peace officer under such circumstances if:

a. the peace officer was engaging in the apprehension or attempted apprehension of law violators or suspected law violators, or protection or preservation of life or property, or the preservation of the peace; and
b. prior to the **occurrence**, the Governing Board of the **Covered Party** has adopted a resolution, as provided for in California Labor Code Section 3600.2, subdivision (b)(4), accepting liability for such injury under the **Workers' Compensation Act.**

"Peace officer" for purposes of this Endorsement has the definition stated in Section 50920 of the California Government Code.

It is further agreed that nothing herein shall act to increase PRISM's limit of indemnity.

This endorsement is part of the Memorandum of Coverage and takes effect on the effective date of the Memorandum of Coverage unless another effective date is shown below. All other terms and conditions remain unchanged.

Effective Date: **Memorandum No.:** PRISM 25 EWC-00

Issued to: ALL MEMBERS

Issue Date: June 27, 2025

Authorized Representative
Public Risk Innovation, Solutions and Management

ENDORSEMENT NO. U-5

PUBLIC RISK INNOVATION, SOLUTIONS AND MANAGEMENT (PRISM) EXCESS WORKERS' COMPENSATION

OCCURRENCE DEFINTION AMENDATORY ENDORSEMENT

It is understood and agreed that the DEFINITIONS section of the Memorandum of Coverage is amended as follows:

Section VIII. **OCCURRENCE** is hereby deleted and replaced by the following:

VIII. **OCCURRENCE**:
(A) All **bodily injury** sustained or alleged to have been sustained by one or more **employees** involving one or more **Covered Parties**, from any one disaster, accident or event, or any series of disasters, accident, or events, and is traceable to the same single disaster, accident or event, or series of disasters, accidents or events, shall be deemed to arise from a single **occurrence**; however, any one **occurrence** shall be limited to no more than seven calendar days such that each individual employee claimant's date of injury must fall within the seven calendar day period. PRISM may choose the date when any such seven calendar day period begins, provided that it is not earlier than the date and time of the first recorded employee claimant's date of injury, and provided that no two periods overlap. Should this Memorandum expire or terminate while an **occurrence** covered hereunder is in progress, PRISM will be responsible for its portion of **loss** arising from such **occurrence** under this Memorandum through the conclusion of the seven calendar day period, even if such period extends beyond the term of this Memorandum, subject to the terms and conditions hereof, provided that no amount of **loss** for the same **occurrence** shall be claimed against any renewal or replacement of this Memorandum period.

(B) **Occupational disease** and **communicable disease** sustained or alleged to have been sustained by each **employee** shall be deemed to arise from a separate **occurrence**, and the **occurrence** shall be deemed to take place on the last day of the last exposure, in the employment of the **Covered Party**, to conditions causing or aggravating the disease OR the date upon which the **employee** first suffered disability and either knew, or in the exercise of reasonable diligence should have known, that such disability was caused by his or her employment with the **Covered Party**, whichever comes first.

It is further agreed that nothing herein shall act to increase PRISM's limit of indemnity.

This endorsement is part of the Memorandum of Coverage and takes effect on the effective date of the Memorandum of Coverage unless another effective date is shown below. All other terms and conditions remain unchanged.

Effective Date: **Memorandum No.:** PRISM 25 EWC-00

Issued to: ALL MEMBERS (**Covered Parties**)

Issue Date: June 27, 2025

Authorized Representative
Public Risk Innovation, Solutions and Management

July 01, 2025

STATE OF CALIFORNIA
PUBLIC LIABILITY AND WORKERS' COMPENSATION INSURANCE
FISCAL YEAR JULY 1, 2025 / JUNE 30, 2026

To Whom It May Concern:

In accordance with Government Code section 11007.4, the State of California has elected to be self-insured for liability exposures. Under this form of insurance, the State and its employees acting in the course and scope of their employment are insured for tort liability arising out of official State business. All claims against the State of California based on tort liability should be presented as a government claim to the Government Claims Program, P.O. Box 989052 MS 414, West Sacramento, CA 95798-9052. (Gov. Code section 900, et. seq.) File Government Claim

The State of California has also elected to be insured for its motor vehicle liability exposures through the State Motor Vehicle Liability Self-Insurance Program (VELSIP). This program provides liability coverage arising out of the operations of motor vehicles used by state employees for official state business (California Vehicle Code Sections 17000 and 17001). Motor vehicle liability claims against the State of California should be presented to the Office of Risk and Insurance Management, P.O. Box 989052 MS-403, West Sacramento, CA 95798-9052, (800) 900-3634, claims@dgs.ca.gov. If your motor vehicle liability claim is not resolved within six months from the date of loss, California law requires you to file a formal claim with the Government Claims Program, P.O. Box 989052 MS 414, West Sacramento, CA 95798-9052. (Gov. Code section 900, et. seq.) Report Vehicle Accident Involving State Employees

The State of California has a Master Agreement with the State Compensation Insurance Fund regarding workers' compensation benefits for all state employees, as required by the Labor Code.

Sincerely,

Office of Risk and Insurance Management
Insurance Services Unit

Claim Reporting & Customer Service:
Government Claims Program | Tel 800.955.0045 | gcinfo@dgs.ca.gov
Motor Vehicle Liability Claims | Tel 800.900.3634 | claims@dgs.ca.gov
Self-Insurance Letters: RiskManagement@dgs.ca.gov

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Bethesda, MD 20814

(301) 907-4908
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BINDER & INVOICE

06/20/2025

Fred Godfrey
Alliant Insurance Services, San Francisco
100 Pine Street
11th Floor
San Francisco, CA 94111

Re: Member Name: College of the Law, San Francisco
Policy Number: B57-34Y
Coverage: Primary General Liability, Excess General Liability, Educators Legal Liability and Internship and Professional Liability
Policy Period: 07/01/2025 to 07/01/2026

Dear Fred,

Thank you for your order. Coverage is bound per your written request and subject to the terms of the proposal dated 05/23/2025.

GENERAL LIABILITY

Primary General Liability:

Option	Limit of Liability per Occurrence	Annual Aggregate	Deductible / Aggregate Deductible	Premium Before Credits	Credits	Premium After Credits	Commission / State Tax / Paid-in Surplus Contribution*	Total Due
1	$1,000,000	$3,000,000	$5,000 / Nil	$120,786	$7,247	$113,539	$13,625 / $0 / $0	$113,539

*Paid-in Surplus Contnbut1on (PSC) Is applicable to new policyholders and current members purchasing a new product.

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Excess General Liability:

Option	Limit of Liability per Occurrence	Annual Aggregate	Underlying Limit Retention per Occurrence	Premium Before Credits	Credits	Premium After Credits	Commission / State Tax / Paid-In Surplus Contribution*	Total Due
1	$30,000,000	$30,000,000	$1,000,000	$295,378	$17,723	$277,655	$33,319 / $0 / $0	$277,655

*Pa1d-1n Surplus Contnbut1on (PSC) Is applicable to new policyholders and current members purchasing a new product.

MANAGEMENT LIABILITY

Educators Legal Liability:

Option	Limit of Liability per Claim	Self-Insured Retention per Claim: Non-Indemnifiable trustees, officers / Wrongful Employment Practices / Each Other	Defense Provision	Premium Before Credits	Credits	Premium After Credits	Commission / State Tax / Paid-in Surplus Contribution*	Total Due
1	$25,000,000	$0 / $125,000 / $125,000	Select	$311,777	$18,707	$293,070	$293 / $0 / $0	$293,070

*Pa1d-1n Surplus Contnbut1on (PSC) Is applicable to new policyholders and current members purchasing a new product.

PROFESSIONAL LIABILITY

Internships and Professional Liability:

Option	Limit of Liability per Claim	Annual Aggregate	Deductible/ Self Insured Retention	Coverage	Premium Before Credits	Credits	Premium After Credits	Commission / State Tax / Paid-in Surplus Contribution*	Total Due
1	$3,000,000	$6,000,000	Deductible $0	Blanket Coverage	$22,067	$0	$22,067	$2,207 / $0 / $0	$22,067

*Paid-in Surplus Contribution (PSC) is applicable to new policyholders and current members purchasing a new product.

To issue and release policies, we will need the following:

- None

The invoice for the net amount is attached.

United Educators
Education's Answer.

7700Wisconsin Ave #500
Bethesda,MD 20814

(301)907-4908
www.ue.org

We appreciate your confidence in placing coverage with United Educators. We look forward to serving you and our mutual client during the coming year.

Sincerely,

Lauren Yedlin

Lauren Yedlin
Underwriter III
United Educators
(301) 215-9544 | lyedlin@ue.org
www.ue.org

REPORT ITEM

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

2. SUBJECT: Core Operations - State Budget Planning 2026-27

3. REPORT:

Annually, the College submits its spending and revenue plan to the State of California's Department of Finance along with requests for additional funding through the Budget Change Proposal process for both its operating (i.e., Support) and infrastructure (i.e., Capital Outlay) needs. This process provides information and funding proposals to support the Governor's Budget proposal to be released in January 2026, which in turn serves as the basis for legislative review of the 2026-27 budget.

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

- State support for an ongoing increase of approximately $2.6 million representing a 3% workload budget adjustment.

- Further, the baseline budget submittal, to be submitted in October 2025, will include $10.1 million for 100 McAllister – Annual Allocation for Debt Service for Phase 2 to continue the appropriation made in the Budget Act of 2025.

The College will submit information supporting the need for the 3% fee increase being proposed to the Board of Directors for 2026-27 and will include a plan demonstrating the use of this new revenue and General Fund growth.

A discussion of these and other state funding considerations will occur at the September 12 Board of Directors' meeting.

REPORT ITEM

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

2. SUBJECT: The Academe at 198 McAllister – Fall 2025/26 Leasing Update

3. REPORT:

Attached is a report describing the leasing status at the Academe at 198. The table below gives a high-level summary of leasing as of August 12, 2025.

Leasing Status

	Units	Occupancy - August 12, 2025	
Total Units	656		
Vacancy Factor (5%)	-33	**549**	**84%**
Pro Forma Occupancy Level (95%)	**623**		
UC Law SF Allocation (426 Units)	**FY 2023-24**	**FY 2024-25**	**January 2025 August 12, 2025**
UC Law SF	262	255	286
Academic Village Partnerships	11	21	33
Subtotal	**273**	**276**	**319**
Occupancy	**64%**	**65%**	**75%**
UCSF Allocation (230 Units)	**FY 2023-24**	**FY 2024-25**	**January 2025 August 12, 2025**
UC San Francisco	130	44	182
UC Affiliates	8	0	4
Sub-Total	**138**	**44**	**186**
Allocation	**51%**	**19%**	**81%**
Total Occupancy	**FY 2023-24**	**FY 2024-25**	**January 2025 August 12, 2025**
Actual Occupancy	63%	32%	77%
Master Agreement Occupancy	**63%**	**60%**	**84%**

Academic Village – Academe at 198
Leasing & Marketing Update

Presented to UC Law SF Board of Directors

September 12, 2025

UC Law San Francisco

ACADEME AT 198
EXECUTED LICENSE AGREEMENTS

	Units	Building Occupancy as of August 12, 2025	
Total Units	656		
Vacancy Factor (5%)	-33	**549**	**84%**
Pro Forma Occupancy Level (95%)	**623**		
UC Law San Francisco Allocation (426 Units)	**FY 2023-24**	**FY 2024-25**	**January 2025 August 12, 2025**
UC Law SF	262	255	286
Academic Village Partnerships	11	21	33
Subtotal	**273**	**276**	**319**
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Actual Building Occupancy	63%	32%	77%
Master Agreement Occupancy	**63%**	**60%**	**84%**

ACADEME AT 198
EXECUTED LICENSE AGREEMENTS

	Units	Building Occupancy as of August 12, 2025	
Total Units	656		
Vacancy Factor (5%)	-33	**549**	**84%**
Pro Forma Occupancy Level (95%)	**623**		
UC Law San Francisco Allocation (426 Units)	**FY 2023-24**	**FY 2024-25**	**January 2025 - August 12, 2025**
UC Law SF			
First Year Students	166	144	157
Second Year Students	32	53	72
Third Year Students	24	21	43
Others (LLM, MSL, Staff, etc.)	18	15	14
Office uses	22	22	0
Sub-Total	**262**	**255**	**286**
Academic Village Partnerships			
University of the Pacific - Dugoni	7	5	12
University of San Francisco	2	12	11
Golden Gate University	2	1	0
San Francisco Conservatory of Music	0	1	0
SF School of Ballet	0	1	0
University of Massachusetts Global	0	0	1
UCSF Staff	0	0	8
UC Davis Student	0	0	1
Subtotal	**11**	**21**	**33**
Allocation Occupancy	**64%**	**65%**	**75%**
UCSF Allocation (230 Units)	**FY 2023-24**	**FY 2024-25**	**January 2025 - August 12, 2025**
UC San Francisco	130	44	182
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Actual Building Occupancy	63%	32%	77%
Master Agreement Occupancy	**63%**	**60%**	**84%**

License Data
January, 2025 – August, 2025

Month	New Signing	New Withdrawal	Renewal Signing	Renewal Withdrawal
January	0	0	0	0
February	21	0	0	0
March	52	1	30	0
April	34	2	88	0
May	29	0	1	0
June	28	5	3	0
July	30	3	0	0
August	3	2	0	5

Move In Update

Renewal Resident Housing Stipend:

- **122** were offered a stipend
  - 113 @ $300
  - 9 @ $200

New Resident Housing Stipend:

- **197** were offered a stipend
  - 173 @ $250
  - 24 @ $200

Move-In Summary (August 8–10):

- Successfully completed **173** move-ins over the three-day period
- Received **10** minor work order requests (**5.78%** of total move-ins)

Webinars:

- Co-Hosted 4 Zoom townhalls with Admissions to provide incoming students with detailed housing information (April and July)

In-Person Strategies:

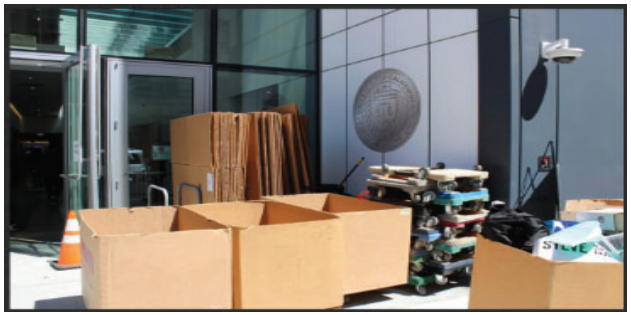
- Provided 73 physical tours with model units between January 1st & August 1st
- Participated in “Admitted Students Day” on March 22, 2025

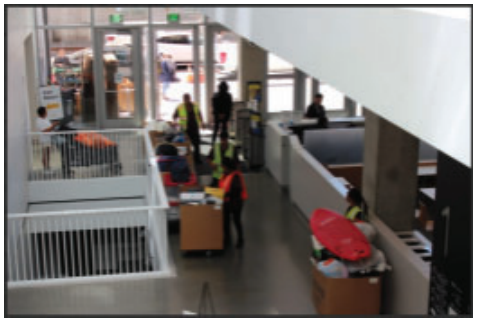


Move In Update

- **Academic Partner Outreach:**
  - Provided housing for 8 UCSF staff
  - Provided housing for 1 UC Davis student
- **Short Term Accommodations**:
  - Provided 72 housing units to San Francisco Human Rights Commission for a 6-week program. Contract total: $217,600
  - Provided 9 housing units to LexLab for a one-week conference

    Contract total: $3,220





Academic Village – Academe at 198
Leasing & Marketing Update

Presented to UC Law SF Board of Directors

September 12, 2025

UC Law San Francisco

REPORT ITEM

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

2. SUBJECT: Academic Village – 100 McAllister – Series 2025 Bonds – Financing Timeline

3. REPORT:

Attached is the preliminary financing timeline for the 100 McAllister project. This will be discussed at the September 12 Board of Directors' meeting.

Attachment:

- Preliminary Financing Schedule – 100 McAllister Project, August 2025

UC Law San Francisco
100 McAllister Financing | State Appropriation Bonds
Series 2025

Preliminary Financing Schedule
As of Aug 11, 2025



100 McAllister Financing Meetings will be held in-person at Raymond James SF office and via Zoom

Dates	Events	Responsible Party
	Week of August 4	
Monday, August 4	HTC Working Group Meeting -- 1pm PT (In-Person & Zoom)	WG
	100 McAllister Financing Meeting - 2pm PT (In-Person & Zoom)	All
	Week of August 11	
Monday, August 11	100 McAllister Financing Meeting	All
	Review 3rd draft Indenture	All
	Review initial draft POS	All
	Discuss timeline for Credit Presentation	SM
	Agenda Deadline for Reimbursement Resolution	UCL
	Week of August 18	
Monday, August 18	100 McAllister Financing Meeting	All
	Review Indenture/POS updates?	BC/DC
Thursday, August 21	UC Law Finance Committee Meeting to Approve Reimbursement Resolution	UCL
	Week of August 25	
Monday, August 25	100 McAllister Financing Meeting	All
	Review Indenture/POS updates?	All
	Initial draft credit presentation distribution	SM
	HTC Solicitation released	CSG/UCL
	Week of September 1	
Monday, September 1	***Labor Day***	
Tuesday, September 2	100 McAllister Financing Meeting [Time/Zoom or In Person]	All
	Refine POS / Credit Presentation	All
	Week of September 8	
Monday, September 8	100 McAllister Financing Meeting	All
	Refine POS / Credit Presentation	All
	Week of September 15	
Monday, September 15	100 McAllister Financing Meeting	All
	Refine POS / Credit Presentation	All
Tuesday, September 16	*FOMC Meeting*	
	Week of September 22	
Monday, September 22	100 McAllister Financing Meeting	All
	Refine POS / Credit Presentation	All
Friday, September 26	Receive LOIs for HTCs	UCL

**Preliminary - Subject to Change*

	Week of September 29	
Monday, September 29	100 McAllister Financing Meeting	All
	Evaluate LOIs/Interview Proposers for HTCs	CSG/UCL/REC
	Credit Package to Rating Agencies & Insurers (Trust Agreement, POS, etc)	SM
	Week of October 6	
Monday, October 6	100 McAllister Financing Meeting	All
Tuesday, October 7	Agenda titles due for 10/21 UC Law Board Meeting	BC
	Week of October 13	
Monday, October 13	***Indigenous Peoples' Day***	
Tuesday, October 14	100 McAllister Financing Meeting [Time/Zoom or In Person]	All
	Receive Audit and Coverage Report	UCL
	Receive Draft Market Study; Discuss Coverage Test	All
	Complete Decision on Approach to HTCs?	UCL
Tuesday, October 14	Agenda deadline for Financing Documents to UC Law for 10/21 Board Meeting	BC
	Week of October 20	
Monday, October 20	100 McAllister Financing Meeting	All
	Complete 2020 Bond Ground Lease Coverage Test	All
	Due Diligence Call	UWC
Tuesday, October 21	UC Law Board Meeting to Approve Financing	UCL
	Week of October 27	
	Credit Presentation	All
Tuesday, October 28	*FOMC Meeting*	
	Week of November 3	
	Receive Rating & Insurance Bids	All
	Evaluate Insurer Bid; Prepare to Post POS	UCL/CSG/SM/CSM/BC/DC
	Investor Presentation (placeholder)	SM
Thursday, November 6	Post POS / Investor Presentation	DC/SM
	Week of November 17 or December 1	
	Pre-Pricing Call	All
	Pricing /BPA	All

	Week of December 8 or December 18	
	Pre-Closing	All
	Closing	All

Responsible Party	
UCL	Issuer - UC Law San Francisco
BC	Bond Counsel – Orrick, Herrington & Sutcliffe
FC	Financial Consultant - Gamble Strategies
REC	Real Estate Consultant - Century Urban
CSG	Municipal Advisor – CSG Advisors
SM	Senior Manager - Raymond James & Associates
CSM	Co-Senior Manager - Loop Capital
UWC	Disclosure/Underwriter's Counsel - Nixon Peabody LLP

REPORT ITEM

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

2. SUBJECT: Tenderloin Investment Partnership

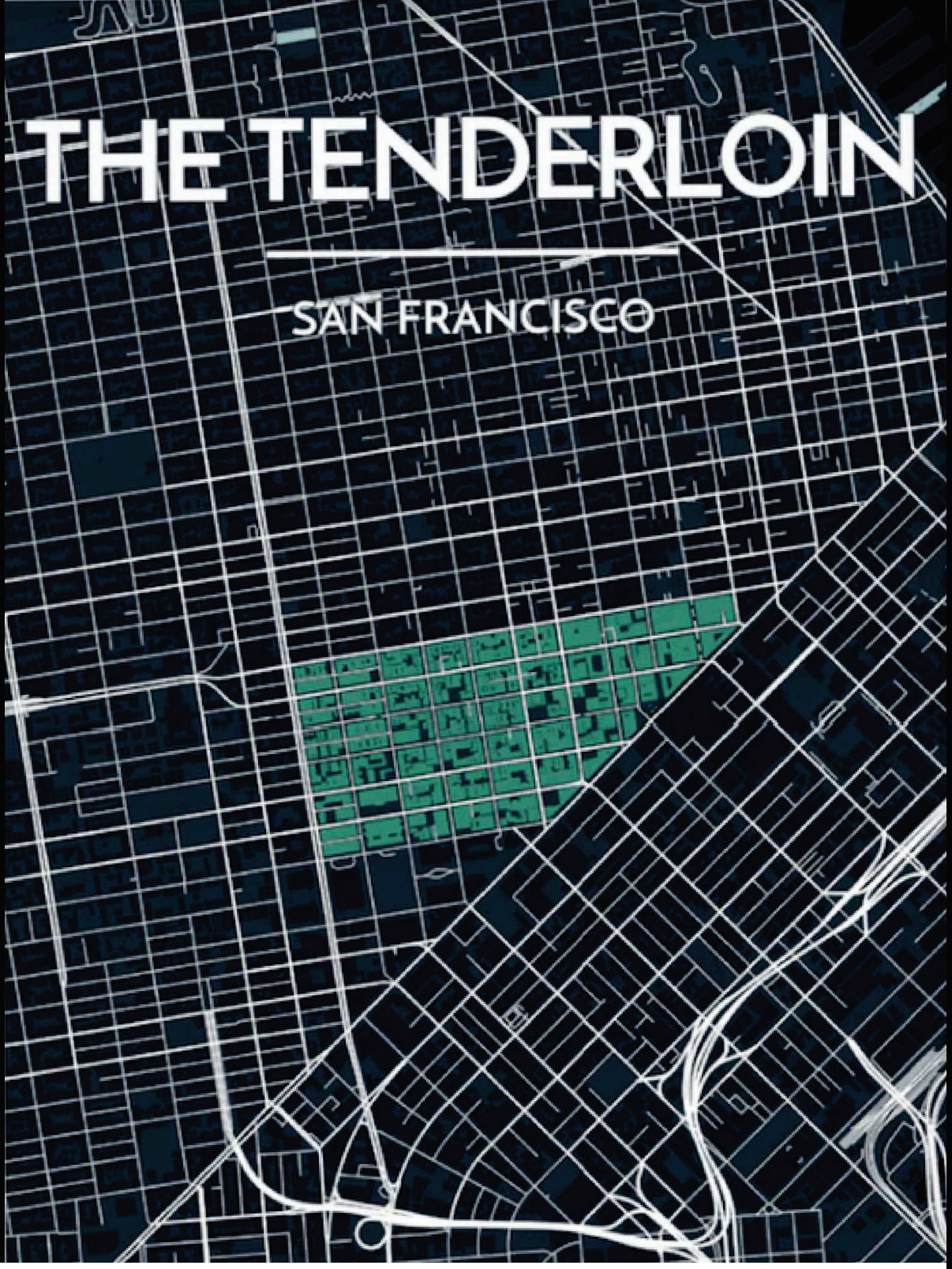
3. REPORT:

An oral report will be presented to the Board of Directors' meeting regarding the Tenderloin Investment Partnership, a collaboration between the TL Community Benefits District, Tenderloin Museum, and the Boys and Girls Clubs of San Francisco.

Attachments:

- The Tenderloin Reimagined, Tenderloin Investment Partnership, July, 2025

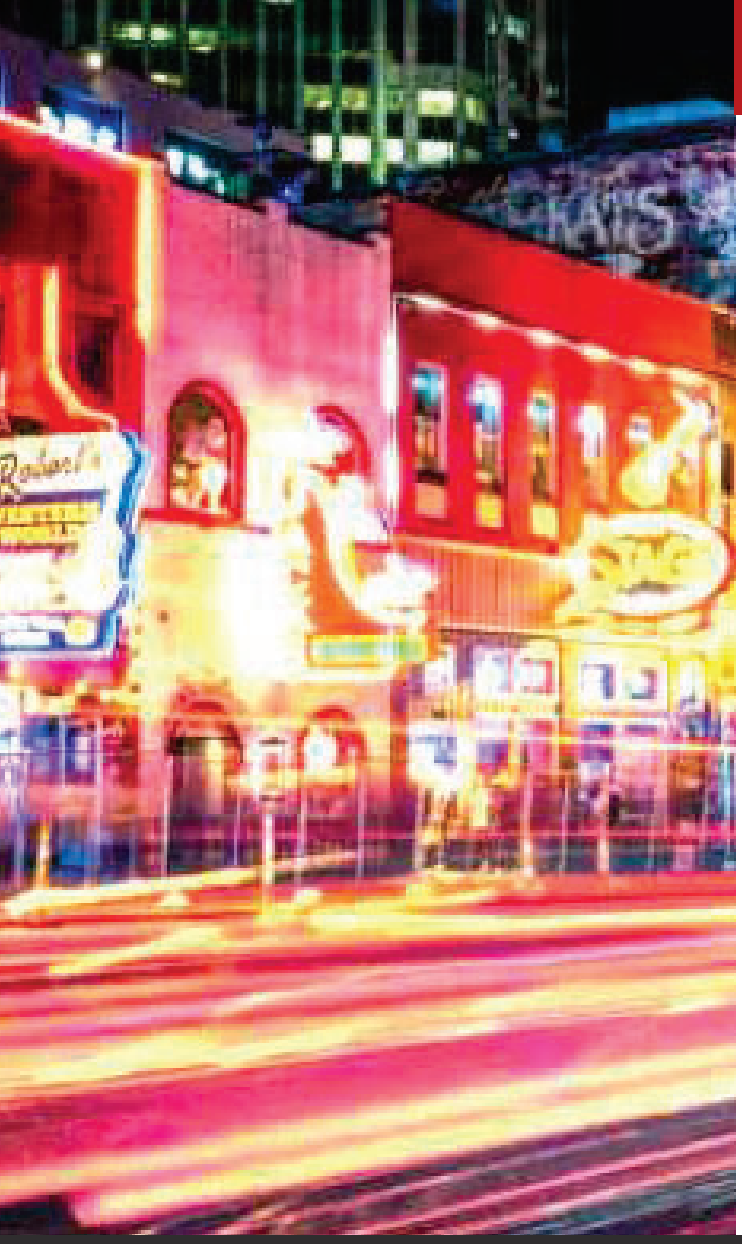
2025



THE TENDERLOIN REIMAGINED

Prepared by: Tenderloin Investment Partnership

UC Law San Francisco
Tenderloin Museum
Tenderloin Community Benefit District
Boys & Girls Club of San Francisco



Who We Are + What We're Doing

The Tenderloin Investment Partnership is a coalition of four anchor institutions with deep roots in San Francisco's Tenderloin: UC Law San Francisco (UC Law SF), the Tenderloin Community Benefit District (TLCBD), the Tenderloin Museum, and Boys & Girls Clubs of San Francisco's (BGCSF) Tenderloin Clubhouse. Each of us serves as **pillars for service, advocacy, and resilience in this community**. For decades, we have worked for and with one another — serving on each other's boards, sharing resources, advocating for the community, and lifting up the voices of one of San Francisco's most resilient, yet overlooked neighborhoods. Today, **we unite in shared purpose, vision, and action**. We have come together to **transform not just the Tenderloin, but San Francisco's urban core itself**.

Through coordinated capital campaigns and catalytic infrastructure investments, our Partnership will bring **educational, economic, cultural, and social revitalization to one of San Francisco's most historically marginalized neighborhoods.** Transforming the lived environment through major physical improvements, this is not merely about buildings — it's about **creating the conditions for a thriving future for thousands of families, children, students, workers, and small businesses**. Together, we stand to support San Francisco's revitalization. We believe that **equity requires investing deeper** — especially in difficult times.

Tenderloin Investment Partnership

Mission + Vision

Mission: To unite San Francisco's Tenderloin anchor institutions in a transformative investment partnership that leverages each of capital projects to **build an equitable, prosperous, and resilient future for the Tenderloin community, its visitors and ultimately all of San Francisco**.

Vision: We envision a Tenderloin that thrives—a vibrant, walkable downtown hub where youth flourish, small businesses grow, culture is celebrated, and community gathers. Collectively, our individual projects **create a new civic commons, one rooted in opportunity, equity, and collective pride**.

Our Projects

The Tenderloin Investment Partnership brings together **four transformative capital projects** that represent a coordinated strategy to reinvest in one of San Francisco's most challenged yet promising neighborhoods. **UC Law SF's Academic Village** reimagines the urban campus as a place for students and professionals from multiple institutions to live and learn together. **TLCBD's new Tenderloin Community Center at 200 Leavenworth** will serve as a one-stop hub for English as a Second Language (ESL) teaching, financial literacy, youth services, training and career pathways. **The Tenderloin Museum is breaking ground in the summer of 2025**; tripling its footprint, launching new cultural programming and a permanent theatrical production to preserve and amplify the neighborhood's history. Meanwhile, **BGCSF** is building a larger, **state-of-the-art Clubhouse** to serve Tenderloin youth, ages six to 18, focusing on programs that help youth achieve academic success, healthy lifestyles, job readiness with earning potential, a[illegible]d character and community engagement. Together, these projects a comprehensive model for equitable urban investment.

UC Law | Academic Village





Education + Economic

UC Law SF is investing in San Francisco's Academic Village, which creates a shared urban campus providing academic and residential spaces for the collective use of strategic higher education partners including UCSF, UC Davis, University of the Pacific, San Francisco State (SFSU), and the University of San Francisco. This enhanced campus seeks to serve the students and professionals that live and learn there, while embracing the surrounding community. With the completion of **656 new units of campus housing, classroom space, and ground-floor retail at 198 McAllister in August 2023**, UC Law SF is now embarking on the development of 280 additional campus housing beds, for students and professionals, at the historic 100 McAllister Street Project. **San Francisco's Academic Village is more than a campus expansion—it's an economic driver for local opportunity**. By ultimately quadrupling the number of residents in the Tenderloin, without displacing a single existing San Francisco resident, the Academic Village provides ready customers to support local businesses. And by partnering with Unite Here/Local 2, a labor organization representing hotel and restaurant workers to develop their property at 201-247 Golden Gate Avenue, the growth of UC Law's campus provides **career pathways, legal resources, and a replacement union hall as an element of the site's development**. UC Law SF is an anchor of institutional support within the Tenderloin and is demonstrating its optimism in the neighborhood's future.



Sector Impact:

- **Education**
- **Housing Production and Stability without Displacement**
- **Unite Here/Local 2 Institutional Anchor**
- **Positive Economic Impact in the Civic Center, Mid-Market + Tenderloin Districts**

Tenderloin Museum





Culture, Art + Neon

Since its opening in 2015, the Tenderloin Museum has grown into a vital cultural hub, featuring a permanent history exhibition, dynamic public programs, and a contemporary art gallery. **The Tenderloin Museum** actively cultivates belonging by creating a cultural anchor space where San Francisco's most diverse neighborhood communities see themselves reflected, celebrated, and empowered. At the heart of the museum's mission is the amplification of historically marginalized voices, **creating permanent platforms for authentic storytelling, collective healing, and shared joy.** Now, the Tenderloin Museum is expanding its physical space from 3,200 to 10,000 square feet and has launched a **groundbreaking immersive theatrical production on the Compton's Cafeteria Riot** — a seminal moment in LGBTQ+ resistance. The museum's new and revitalized exhibits will **shine a light on often-overlooked histories**; including the Southeast Asian diaspora and, Tenderloin Black history, the California Labor School, South Asian SRO hoteliers, oral histories from residents, and the neighborhood's vibrant neon legacy — **becoming a national model for place-based storytelling and cultural justice**. A new **early education area** will connect Tenderloin youth and families to their **shared neighborhood heritage** through interactive learning and play. The museum's expanded space will provide room for **dialogue, learning, and creativity** — for those who call the Tenderloin home, and for visitors seeking to engage more deeply with its past, present, and future.



Sector Impact:

- **Arts & Culture**
- **LGBTQ+ History + Underrepresented Local Histories**
- **Early Education**
- **Civic Identity & Tourism**
- **Small Business + Physical Improvements**

Tenderloin Community Center





Economic Mobility + Resilience

Tenderloin Community Benefit District – Tenderloin Community Center at 200 Leavenworth



TLCBD is transforming 200 Leavenworth into the Tenderloin Community Center (TLC) — **a centralized, multi-service facility offering English as a Second Language (ESL) classes, digital and financial literacy training, youth work-readiness training and internships, legal assistance, workforce development and small business supports**. The center will provide apprenticeships in high-demand fields in partnership with local unions, employers and city agencies, **advancing economic mobility for immigrant youth and families, removing barriers and forging pathways into long-term, family sustaining careers for Tenderloin residents**. Additionally, the Tenderloin Community Center will be a Resilience Center: providing emergency and disaster response, shelter, resources and neighborhood wide coordination and resilience for the City's most vulnerable.

Sector Impact:

- **Immigrant and adult education**
- **Youth apprenticeships + services**
- **Job training + workforce development**
- **Immigrant legal + support services**
- **Small business supports**
- **Emergency response + re[illegible]ce**

Boys & Girls Clubs of San Francisco





Education + Work Readiness



Boys & Girls Clubs of San Francisco is looking to consolidate services into one, full-service Clubhouse with a goal of increasing daily attendance for youth ages six to 18 by over 50%. The Clubhouse will provide a comprehensive range of programs including **academic support, leadership development, college preparation, workforce readiness, behavioral health services, sports, fitness and play, and the arts.** This facility will **significantly enhance access to development supports, care and opportunity for youth living in the Tenderloin**.

Sector Impact:

- **Youth development**
- **Education**
- **Health and wellness**
- **Leadership and community engagement**
- **Family support**
- **Workforce readiness**

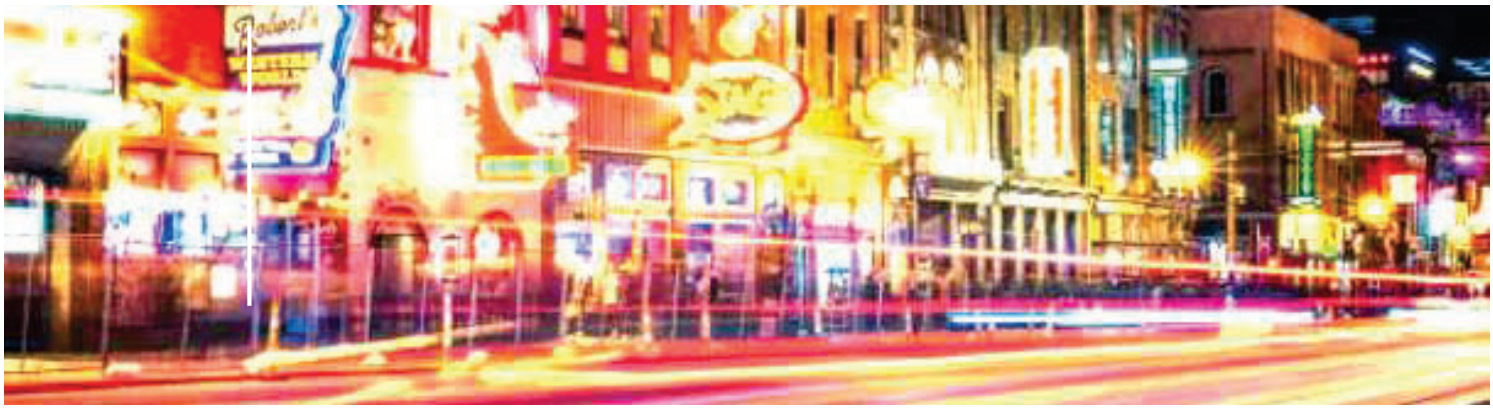
Proposed Partnership Details

An Invitation to Be Part of History

To every philanthropist who has ever asked, “Where can I make the greatest difference?”
To every civic leader who has said, “Let’s do equity differently this time.”
To every investor who sees cities not as markets but as ecosystems — This is your moment. This is your neighborhood. This is your legacy.
We are offering partnership. We are building something real, lasting, and rare. The kind of project that decades from now, a child who grows up here will point to and say: “That changed my life.”
Let’s build that future—together.

Funding Goals

- UC Law — $25 Million
- TL Museum — $3.7 Million
- TLCBD Tenderloin Community Center — $25 Million
- Boys & Girls Club — $15 Million



Timeline

- UC Law — 3 Projects Underway
- TL Museum — Breaking Ground June 2025
- TLCBD Tenderloin Community Center — July 2025 - June 2028
- Boys & Girls Club — Winter 2025



Conclusion

Together, these investments offer more than buildings—they **lay the foundation for a stronger, more inclusive San Francisco**. In the Tenderloin, where disparities are deep and potential runs even deeper, **this coordinated vision turns community resilience into lasting infrastructure**, and long-standing inequities into opportunity. These four projects can and will create new conditions that will drive additional investments in the people, businesses, and institutions in the neighborhood. The Tenderloin Investment Partnership is ready, the projects are underway, and **the impact will be generational**. For investors, public leaders, and philanthropic partners, this is a rare moment to align with a shared, shovel-ready solution —one that **not only revitalizes a neighborhood but helps chart a new course for our city**. By investing here, **you are investing in equity, in community, and in a future that belongs to all of us**.

Contact Information

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ED
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Rob Connolly
Boys & Girls Club of San Francisco
President
rconnolly@kidsclub.org

REPORT ITEM

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

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 05/01/2025-07/31/2025:

Date	Check No.	Vendor Name	Amount	Description
5/2/2025	E0080751	Plant Construction Company LP	$ 2,450,000	Construction Costs – 100 McAllister – March 2025
5/5/2025	ACH2464	Regents of the University of Calif.	$ 4,471,958	UCPath Payroll March 2025
5/16/2025	E0080923	Another Planet Entertainment	$ 126,869	Rental of Bill Graham Auditorium for Graduation
5/23/2025	E0080969	George S. Hall, Inc.	$ 178,269	Custodial Services – April 2025
5/23/2025	E0080976	Mid-Market Foundation	$ 657,772	Urban Alchemy Security – Q1 2025
5/30/2025	E0081095	Township Building Services, Inc.	$ 154,659	Custodial Services – May 2025
5/30/2025	E0081096	UCSF Police Department	$ 247,253	UCSF Security – Q3 2025
6/6/2025	E0081124	Carbon Health Technologies, Inc.	$ 233,118	Student Health Services – Spring 2025
6/6/2025	E0081132	George S. Hall, Inc.	$ 189,718	Engineering Services – April 2025
6/6/2025	E0081139	Perkins & Will, Inc.	$ 283,861	Architecture Services – 100 McAllister – March 2025
6/13/2025	E0081162	Regents of the University of Calif.	$ 230,649	UCPath Debt Service – Q2 FY25
6/20/2025	E0081203	Plant Construction Company LP	$ 3,312,605	Construction Costs – 100 McAllister – April 2025
6/23/2025	ACH2471	Regents of the University of Calif.	$ 4,863,028	UCPath Payroll – April 2025
6/25/2025	0283242	PG&E Company	$ 103,783	Electric Services – May 2025
6/27/2025	E0081281	George S. Hall, Inc.	$ 189,718	Engineering – Campus Buildings – May 2025
6/27/2025	E0081295	Township Building Services, Inc.	$ 154,659	Custodial Services – June 2025
7/3/2025	E0081398	Ellucian Company LLC	$ 479,963	ERP System – FY26
7/3/2025	E0081404	Mid-Market Foundation	$ 334,003	Urban Alchemy – Security – May 2025
7/3/2025	E0081407	Perkins & Will, Inc.	$ 172,702	Architecture Services -100 McAllister – April 2025
7/3/2025	E0081408	Regents of the University of Calif.	$ 115,325	UCPath Debt Service – Q3 FY25
7/3/2025	E0081415	Plant Construction Company LP	$ 3,501,024	Construction Costs – 100 McAllister – May 2025
7/11/2025	E0081454	PRISM	$ 118,232	Workers Compensation – FY26
7/18/2025	E0081478	AllCampus PB LLC.	$ 200,000	Marketing Program – Admissions – FY26
7/18/2025	E0081479	Alliant Insurance Services	$ 851,799	Insurance – United Educators – FY26
7/18/2025	E0081484	Build Group, Inc.	$ 133,373	Food Services Upgrade – Service through June 2025
7/18/2025	E0081490	Eplus Technology, Inc.	$ 103,683	Cisco WiFi Upgrade – Academe at 198
7/18/2025	E0081491	George S. Hall, Inc.	$ 189,718	Engineering Services – June 2025
7/18/2025	E0081514	Alliant Insurance Services	$ 439,943	College-Wide Property Insurance – FY26
7/23/2025	0283332	PG&E Company	$ 155,675	Electric Services – 200 McAllister – June 2025
7/30/2025	0283357	University of California San Francisco	$ 360,587	HPL Program – Academic Year 2025

David L. Faigman
Chancellor & Dean
William B. Lockhart Professor of Law and
John F. Digardi Distinguished Professor of Law
Professor, UCSF School of Medicine (Dept. of Psychiatry)

UC Law San Francisco | 200 McAllister Street | San Francisco, CA 94102
phone 415 565 4600 | faigmand@uclawsf.edu | uclawsf.edu

August 20, 2025

Senate President pro Tempore Mike McGuire
1021 O Street, Suite 8518
Sacramento, CA 95814

Assembly Speaker Robert Rivas
State Capitol
P.O. Box 942849
Sacramento, CA 94249-0029

Re: Annual Report on Name Change and Restorative Justice Initiatives

Dear Senate President pro Tempore McGuire and Assembly Speaker Rivas:

Pursuant to Chapter 478, Statutes of 2022 (AB 1936) and EDC 92200 et seq. of the California Education Code, enclosed is the report of UC College of the Law, San Francisco to the Legislature and Assembly Select Committee on Native American Affairs on the progress of effectuating AB 1936, including the College's name change and the various initiatives outlined in the bill.

If you have any questions, Jenny Kwon, Assistant Chancellor & Dean/Chief of Staff, would be pleased to speak with you. Jenny can be reached by telephone at (415) 565-4627, or by email at kwonjenny@uclawsf.edu.

Best regards,

David L. Faigman
Chancellor and Dean
UC Law San Francisco

Enclosure

cc: Assembly Member James Ramos, Chair, Select Committee on Native American Affairs
Assembly Budget Committee, Chair, Assembly Member Jesse Gabriel
Senate Budget and Fiscal Review Committee, Chair, Senator Scott Weiner
Senate Budget and Fiscal Review Subcommittee #1, Chair, Senator John Laird
Assembly Budget Subcommittee #3, Chair, Assembly Member David Alvarez
Governor's Tribal Affairs Secretary Christina Snider-Ashtari
Governor's Chief Deputy Cabinet Secretary Ben Chida
Senate Judiciary Committee, Chair, Senator Tom Umberg
Ms. Linda Sacks, Senior Consultant to the California Native American Caucus
Ms. Sue Parker, Chief Clerk, Office of the Chief Clerk of the Assembly
Ms. Erika Contreras, Secretary of the Senate
Ms. Gabriela Chavez, Department of Finance
Mr. Gabriel Petek, Legislative Analyst Office
Mr. Ian Klein, Legislative Analyst Office
Assistant Chancellor & Dean/Chief of Staff Jenny Kwon, UC Law SF
Provost & Academic Dean Morris Ratner, UC Law SF
Chief Financial Officer David Seward, UC Law SF
Chief Operating Officer Rhiannon Bailard, UC Law SF

2025 California Annual Report
Assembly Bill 1936
August 20, 2025

I. Introduction and Background

In 2017, Chancellor & Dean David Faigman convened a committee to study the actions of its founder, Serranus Hastings, and his involvement in mass killings of Native Americans, particularly of the Round Valley Indian Tribes (RVIT) and Yuki People (also known as the Witukomno'm People of Eden Valley and Powe' N'om). As a result of this study and after several hearings with affected Indigenous People, alumni, students, staff, and faculty, in the fall of 2021, the College's Board of Directors voted to rename the school. In July 2022, the Board unanimously chose University of California College of the Law, San Francisco as its new name. This was followed by a vote by the state Legislature that overwhelmingly approved Assembly Bill 1936, authored by Assembly Member James C. Ramos (D-San Bernadino), that changed the state Education Code to adopt the College's new name. On September 23, 2022, California Governor Gavin Newsom signed AB 1936 into law. AB 1936 became effective on January 1, 2023, as Chapter 478, Statutes of 2022.

II. Progress on Name Change

As of July 2025, the College is fully rebranded as UC Law San Francisco. The College implemented additional communications strategies in FY25 to ensure that awareness of the name change reached all audiences relevant to the College, including institutions of higher education, government offices, judges, and potential employers nationwide.

III. Progress on Restorative Justice Initiatives

The College continues to commit time and resources to various restorative justice initiatives wherever applicable and appropriate. Chancellor & Dean Faigman's Restorative Justice Advisory Board continues to meet regularly on the status of initiatives where forward progress is possible. In June 2025, College leaders met in person with the new sitting President, Joseph Parker, members of the Tribal Council, and Tribal Business Administrator, Jim Russ (also former RVIT President, and President during the time of the College's initial outreach many years ago and through the signing of AB 1936) at the Round Valley Indian Tribes administrative building in Covelo, CA. The College is discussing hosting a meeting of the Tribal Council in San Francisco in Fall 2025.

The College remains committed to proceeding with initiatives where there is mutual interest and engagement.

Highlights of this year's key accomplishments are outlined below:

- The College continued to successfully fund summer law fellows to offer pro bono legal support to California tribes. The College funded two 2025 Summer Fellows, and funding for up to four 2026 Summer Fellows is in progress. Summer fellows work full-time with various legal organizations and judges in Mendocino and Humboldt Counties, offering pro bono legal support to members of California tribes, with prioritization wherever possible for any cases involving RVIT members. Summer 2025 placements included the following:
    - Legal Services of Northern California, Ukiah
    - Chambers of Judge Joseph Wiseman (Tribal Judge for RVIT)
- In 2023, the College connected with attorneys at McDermott Will & Emery LLP through an alum. As of May 2025, RVIT continues to consider their pro bono offer.

- The College continues to offer the Native American Opportunity Plan, a $13,000 scholarship to any incoming student who has established California residency and is also a member of a federally recognized Native American, American Indian, or Alaska Native tribe. The amount of the scholarship matches a similar award offered by the UC and is equivalent to the cost of UC tuition and fees. The College welcomes applicants to UC Law SF from RVIT. The admissions team is actively reviewing any existing applications who may qualify, and is prepared to discuss questions with eligible applicants.

- Led by Director and Professor Jo Carrillo, the College's Indigenous Law Center continues to be active in its programming and scholarly efforts. This year, Professor Carrillo served on a master thesis committee at the invitation of the Cal Poly Humboldt Natural Resources Department; pursuant to a Tribal Data Sovereignty Agreement, the student researcher (Alyssa Suarez) collected and analyzed data for the Yurok Tribe but under the direction of her thesis committee. Professor Carrillo and Professor Jennifer Marlow, of Cal Poly Humboldt and a member of the master's thesis committee, are now producing a data analysis report for the Yurok Tribe.

- This year, the College connected with Superintendent of the Round Valley Unified School District Stephanie Steffano-Davis and Principal Amanda Derby of Round Valley High School to discuss and establish a scholarship to support graduates of Round Valley High School in attaining their educational goals. The College successfully established a quasi-endowment with a capitalization of $250,000, with the intention of spending 4% annually ($10,000) towards scholarship awards. An MOU establishing the parameters for the scholarship was signed at Round Valley High School on June 18, 2025. Round Valley Unified School District will establish an awards committee that will manage the selection of awardee(s) starting in spring 2026. Awards can go towards any qualified postsecondary institution.

- The College and Round Valley High School are continuing to discuss establishing a Moot Court Program between Round Valley students and UC Law SF students. The College would need funding for such a program, but would help fundraise where possible.

- The College has maintained relationships with Yuki members of RVIT over the years. Although no members of the tribe have been admitted to the College since the initial outreach in 2017, College leadership has advised individual members on educational attainment wherever possible. In particular, the Medel family has remained in close contact with College leadership since first meeting in 2019, introducing them to the many generations of their family members. One of their family members, a rising junior at UC Irvine, has had an interest in law school since high school. For the summer of 2025, the College was able to arrange for her to join two other undergraduate summer interns to support various College efforts, including the Communications Office and the California Institute on Law, Neuroscience and Education. Another family member has shown interest in our Master of Legal Studies (MLS) program, attending an info session for the program.

IV. Name Change Costs to Date

The Budget Act of 2022 included a one-time appropriation of $885,000 for costs associated with the new name of the College. A total of about $3,620,000 has been allocated for the name change thus far. Below is a summary of expenses for FY25 to effectuate the name change.

FY25 Description	Budget	Actuals	Encumbrances	Total Cost	Balance
CONTRACT-OTHER	278,760	253,654	-	253,654	25,106
LEGAL SERVICES	8,483	586	-	586	7,897
FY 25 TOTAL	**287,243**	**254,240**	**-**	**254,240**	**33,003**

In 2023 several of Serranus Hastings' descendants and a small group of alumni filed a lawsuit challenging the name change. The College moved from fee-based representation to pro bono representation in Fall 2023, thus capping its litigation costs for the time being. On February 6, 2024, the Superior Court of California granted the College's and the State's demurrers on all counts. The plaintiffs appealed, and arguments have been heard by the California Court of Appeal, but it has not issued a decision yet.

V. Restorative Justice Initiatives Allocations for FY25

The following funding was allocated in FY25 for the work of the Indigenous Law Center.

FY25					
Description	**Budget**	**Actuals**	**Encumbrances**	**Total Cost**	**Balance**
ILC Faculty and Scholars: Regular Faculty Salaries	$ 25,000.00	$ 25,000.01	$ -	$ 25,000.01	$ (0.01)
ILC Faculty and Scholars: Benefits	$ 600.00	$ 599.97	$ -	$ 599.97	$ 0.03
Student Employees	$ 12,000.00	$ -	$ -	$ -	$ 12,000.00
Travel	$ 6,712.00	$ -	$ -	$ -	$ 6,712.00
Events, Entertainment Meetings	$ 10,000.00	$ -	$ -	$ -	$ 10,000.00
Stipends	$ 20,000.00	$ 20,000.04	$ -	$ 20,000.04	$ (0.04)
Benefit Provision	$ 6,400.00	$ 6,399.96	$ -	$ 6,399.96	$ 0.04
Contracted Temporary Help Wages	$ 2,000.00	$ -	$ -	$ -	$ 2,000.00
Consultant	$ 1,000.00	$ -	$ -	$ -	$ 1,000.00
Books, Periodicals	$ 500.00	$ 454.05	$ -	$ 454.05	$ 45.95
Supplies	$ -	$ 972.40	$ -	$ 972.40	$ (972.40)
FY25 Total:	**$ 84,212.00**	**$ 53,426.43**	**$ -**	**$ 53,426.43**	**$ 30,785.57**

Additionally, the following funding was allocated in FY25 for restorative justice efforts via the College's fundraising efforts:

FY25 Allocations	**Amount**
Restorative Justice Summer Fellowships	$24,000
RVIT meetings and travel expenses	$3,000
UC Law SF Educational Opportunity Fund (EOF)	250,000
TOTAL	**$277,000**

VI. Plans for Ongoing Efforts

The College remains committed to a long-term relationship with RVIT and their Yuki Committee and looks forward to mutual engagement on various initiatives.