

# Hewlett Foundation 2009 Annual Report



## *The Hewlett Foundation 2009 Annual Report*

*Making grants to solve social and environmental problems, at home and around the world.*



**EDUCATION | ENVIRONMENT | GLOBAL DEVELOPMENT  
PERFORMING ARTS | PHILANTHROPY | POPULATION | SPECIAL PROJECTS**  
**About Us | Board and Officers | Staff**

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This PDF represents a printable version of an annual report that was originally published in digital-only format on an earlier version of the Hewlett Foundation's website. Minor changes have been made to improve formatting.

# About the Foundation

*The William and Flora Hewlett Foundation has been making grants since 1967 to solve social and environmental problems at home and around the world.*

## **The Hewlett Foundation At A Glance (as of December 31, 2009)**

Total Assets: \$6.87 billion  
Total dollar amount of grants and gifts awarded in 2009: \$235,100,000  
Total dollar amount of grants and gifts disbursed in 2009: \$345,190,721  
Total number of grants and gifts awarded in 2009: 596  
Average grant amount in 2009: \$397,225  
Median grant amount in 2009: \$150,000  
Number of employees: 104

This year, President Paul Brest's essay focuses on the newly announced integrated Global Development and Population Program. After more than a year of consultation and planning, the Global Development Program and the Population Program started taking steps to integrate their work into a unified program, recognizing that the work they conduct is mutually beneficial and reinforcing.

You can read the essay and read more about the program integration on the next pages.

# **Integrating The Foundation's Global Development and Population Programs\***

## **President's Statement - 2009 Annual Report**

In March 2010, after more than a year's intensive work by the Hewlett Foundation's staff and Board of Directors, the Foundation decided to combine its Global Development and Population programs into a single program. Building on the traditions and commitments of its antecedents, the new program seeks to improve the lives of the world's most vulnerable people, especially women and girls, through more accountable governance, improved reproductive health and rights, access to quality education, and better economic opportunities. This essay describes the background of the Board's decision.

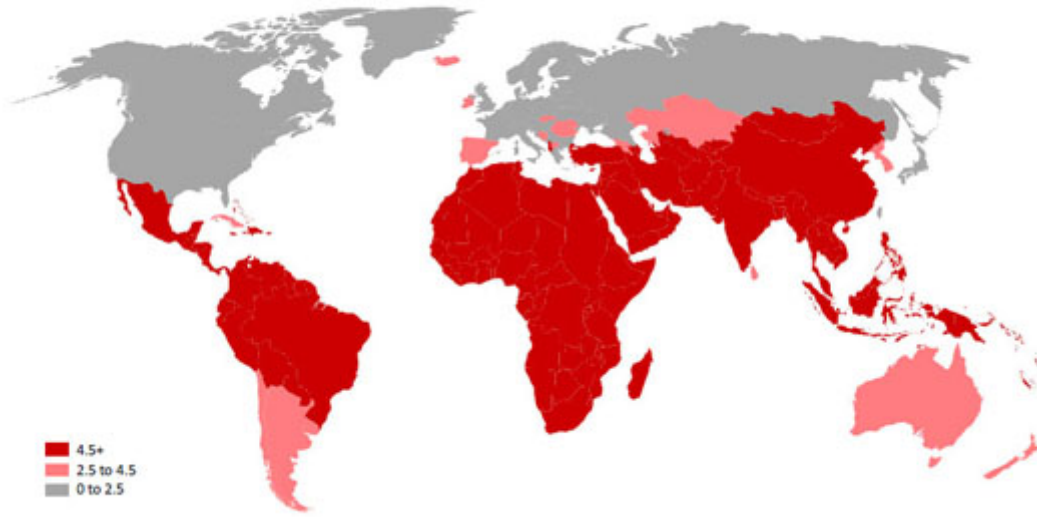
## **History of the Population Program**

Population was prominent among the issues that animated Bill and Flora Hewlett from the earliest days of the Foundation, with grants to Planned Parenthood Federation of America and Planned Parenthood Association of San Francisco dating back to 1967. At that time, the Foundation was concerned about the disastrous effects of unbridled population growth, and supported family planning as a specific method to combat this problem.

In 1977, under the presidency of Roger W. Heyns, the Foundation formally established four programs, all of which remain to this day: Arts and Humanities (now Performing Arts), Education, Environment, and Population. Anne Firth Murray, the first program officer for Population, played a major role in defining its focus: the provision of family planning both domestically and globally.

When the Hewlett Foundation was established, population growth was a problem of global dimensions. Economic development, the increased availability of family planning (aided in part by Hewlett and other foundations), and other forces effectively helped reduce population growth over the next half century. (Figures 1 to 4 illustrate these dramatic changes in global demography.) In the twenty-first century, fertility rates remain high mainly in sub-Saharan Africa and other pockets of extreme poverty.

**FIGURE 1 – TOTAL FERTILITY RATE 1970**



**FIGURE 2 – TOTAL FERTILITY RATE 1990**

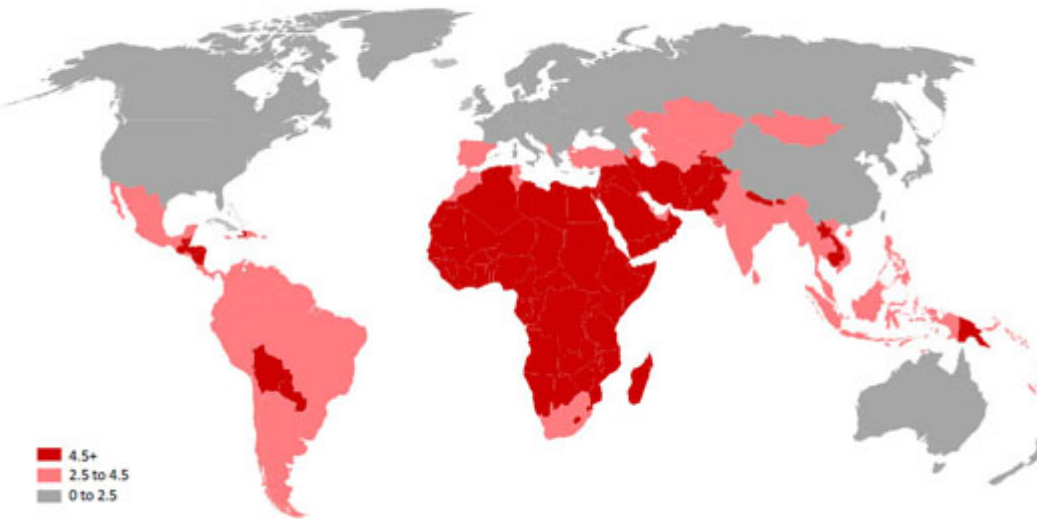


FIGURE 3 – TOTAL FERTILITY RATE 2010

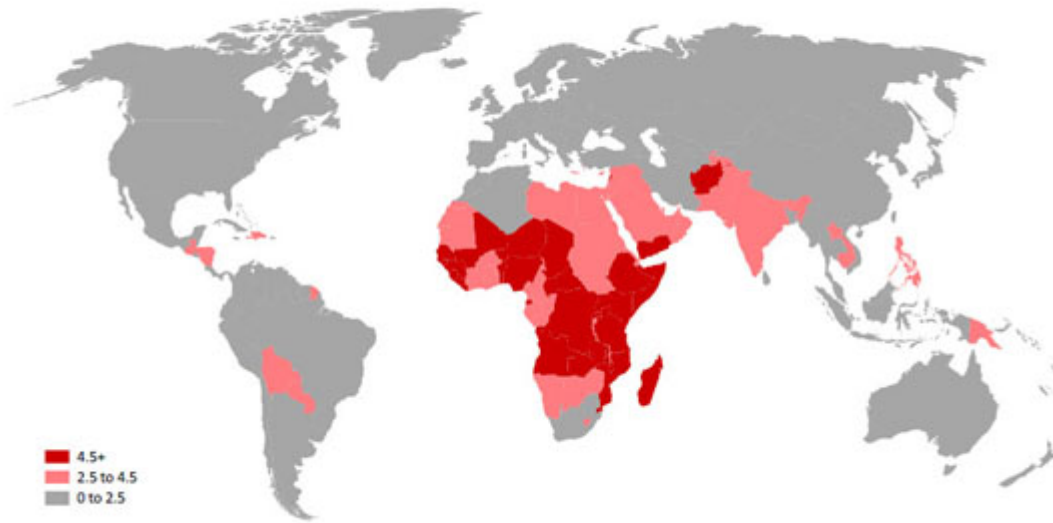
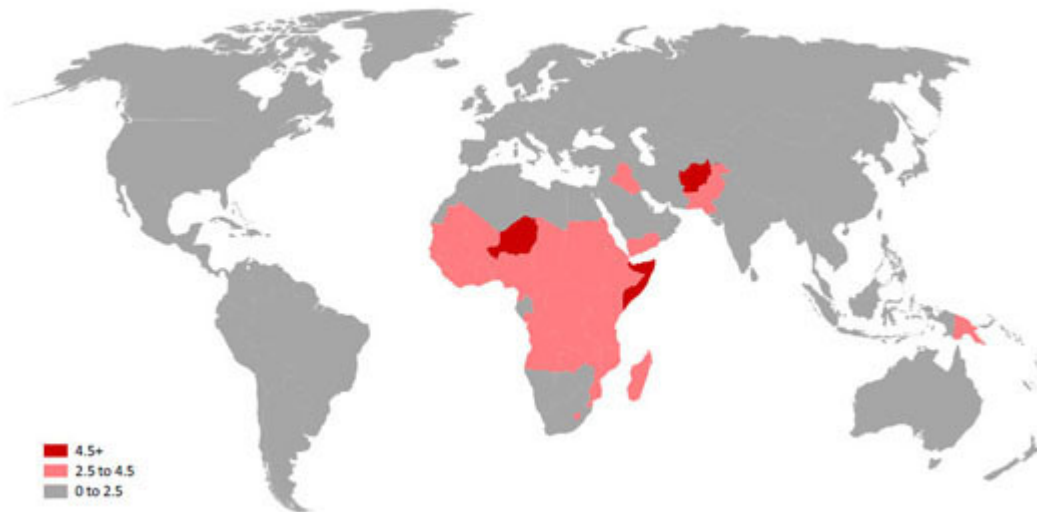


FIGURE 4 – PROJECTED TOTAL FERTILITY RATE 2030



This same period also saw a transformation in global consciousness about issues of reproductive health and rights, which crystallized in 1994 in the United Nations International Conference on Population and Development (ICPD) in Cairo, Egypt. The resulting *Programme of Action* links population, women's well-being, and development as essential means for combating poverty and stabilizing population growth.<sup>2</sup> The *Programme of Action* further recognized the intrinsic value

of reproductive rights and the need to protect them in all countries, regardless of their rates of population growth.

Under the successive leadership<sup>3</sup> of Faith Mitchell (1987 to 1992), Nancy Moss (1993 to 1995), Joseph Speidel (1995 to 2002), and Sara Seims (2003 to the present), the Population Program strengthened its commitment to family planning and reproductive health because of their benefits to individuals, societies, and the entire global community. The Program's work focused increasingly on sub-Saharan Africa, where fertility rates remained, and still remain, high.

Under Ms. Seims' direction, the Program undertook a major review of its overall strategies. This led to the adoption of the mutually reinforcing goals of "promoting and protecting reproductive health and rights and helping governments stabilize their populations in ways that maximize human well-being and sustain the environment." The Program also supported studies of the relationship between fertility rates and access to quality education, and launched a research initiative to understand the complex relationship between family planning and reproductive health on the one hand, and poverty and economic growth in sub-Saharan Africa on the other.

## **Emergence of the Global Development Program**

While Population has been among the Foundation's core programs since its origin, grantmaking in the broader arena of global development emerged only in the past decade.

In 2002, the Board of Directors approved a three-year exploratory initiative led by Smita Singh to identify international problems that the Foundation could meaningfully address. The initiative made grants in areas including foreign aid effectiveness and agricultural trade reform; journalism, media, and public education about global current affairs; research and policy analysis on development and security concerns; and in-country philanthropy. After initial explorations, the initiative concentrated mainly on challenges facing the developing world.

After three years of promising grantmaking, the Board authorized the development of a new Global Development Program, headed by Ms. Singh, with the mission of "improving the lives and livelihoods of people in developing countries, particularly those living on less than \$2 a day." After intense research and consultation, the Program developed a strategic plan that was approved by the Board in 2007. It included a set of initiatives designed to overcome significant barriers to equitable growth:

- Increasing the transparency and accountability of public spending in order to improve basic services.
- Expanding agricultural markets for small farmers.
- Improving educational outcomes for children in developing countries.

In addition, recognizing the importance of developing countries' having independent capacity for policy analysis, the Program supported indigenous policy research institutions and think tanks throughout the developing world.

Although a young program, Global Development quickly gained influence on issues such as reforming development assistance practices, making aid more transparent and accountable, and refocusing global attention on education in developing countries from mere access to quality and outcomes. The Program collaborated in creating the Revenue Watch Institute and the International Initiative for Impact Evaluation, and played a major role in exposing European Union agricultural subsidies and Mexican budget practices to public scrutiny.

## **Collaboration between the Programs**

Virtually since its beginning, the Foundation has been aware of the factors that connect population and reproductive health issues with the broader global development agenda. Early on, Population's Anne Firth Murray had noted that fertility was affected by a country's stage of economic development and by women's access to education and employment: "We had to provide family planning services for women so they had [the] choice to limit their families, and we also had to develop economically and educationally so people would see the value of having fewer children and . . . understand that if they could have healthy children, they didn't need to have ten in order to have three or four survive."

The emergence of the Global Development Program soon led to collaborations with the Population Program that built on these connections. For example, they undertook a joint initiative on Quality Education in Developing Countries, believing that improved learning outcomes in developing countries would have multiple benefits for economic development, health, individual well-being, and fertility. Given the direct links between education and better quality of life for all, and particularly between girls' education and lower fertility rates, the Foundation saw investment in this initiative as a way to further its overarching goals.

Learning from Global Development's work on transparency and accountability, Population launched an initiative for "More Money, Well Spent" on family planning. This effort supports efforts to allocate family planning and reproductive health resources more efficiently and effectively. The two programs seek to ensure that poor people receive high-quality basic services, including clean water, education, and reproductive health.

## **Integrating the Programs**

As we saw these convergences, Sara Seims, Smita Singh, and I began asking whether the Foundation's goals might be more effectively reached by moving beyond informal collaboration between the programs to formally combining them. We saw particular benefits from placing population issues within the broader global development frame. We also recognized that because both program directors were leaving the Foundation within the coming year and a half, this was an opportune time for the Board to address the idea of integration.

Because of its importance to the Foundation's mission, the Board devoted extraordinary attention to this matter, forming a special task force and discussing it at each of its meetings over the course of a year. In March 2009, the Board authorized the three of us to continue to explore the pros and cons of a unified program as well as its possible structure. In the fall and winter of 2009, joined by members of the Board, we met with distinguished experts in population and

other development fields in Washington, DC and New York City.<sup>4</sup> Members of the two programs' staffs also played an important role in charting the future of an integrated program.

These extensive discussions and consultations, which yielded the following broad conclusions:

- At the most fundamental level, the Population and Global Development programs share the goal of improving the well-being of the very poor-particularly women-in developing countries.
- Rapid rates of population growth are increasingly concentrated in sub-Saharan Africa, a region characterized by high unmet need for contraception together with large desired family size. To address both factors, the Foundation should continue to improve the quality and access of family planning and reproductive health services and advance development strategies to reduce desired family size. Indeed, most experts thought that the best way to ensure that women receive the family planning and reproductive health services in the developing world was to treat these services as essential components of poverty reduction and economic growth-that is, to pursue population strategies within a broader set of development objectives. In the words of a renowned population expert, "population stabilization is not an end in itself. It is an important lever to the greater, ultimate goal of global development: to reduce poverty, improve human well-being, and improve health."
- Many of our consultants emphasized the importance of continuing the Foundation's support for reproductive rights, which have proven to be vulnerable in all countries, whatever their development level or population growth rate.
- Women and girls are the most disadvantaged of the poor, and virtually every development strategy-certainly every one the Foundation currently pursues-disproportionately benefits women. However, the Foundation has never defined population or global development issues as "women's issues," but rather as ones for society as a whole, with benefits for economic growth, prosperity, and environmental sustainability. Almost to a person, the experts we consulted thought that it would be counterproductive to the Foundation's goals to make women's well-being the central mission of a unified program. They noted that after more than two decades of unsuccessful women's programs, multilateral and bilateral institutions are moving toward gender mainstreaming to ensure that gender issues are integral to development strategies. The experts also thought that creating a "women's program" would marginalize it among decisionmakers who hold the purse strings.

On a theoretical level, the experts confirmed our belief that the Foundation's investments in the two programs are inextricably linked parts of a virtuous circle: better-educated mothers have fewer children, who are healthier and better educated; improvements in family planning and reproductive health and rights also lead to healthier mothers and children; and these women and children become workers who contribute to society and promote economic growth. At the same time, gains in income and education reduce desired family size and, with an adequate supply of contraception, women have fewer children and invest in them more heavily, contributing to higher per capita wealth.



As a practical matter, the experts believed that a unified program had the potential for considerably greater impact than separate programs. But they cautioned that we should be aware of potential pitfalls as well. The Hewlett Foundation has a long-standing concern for population issues, a more recent but highly promising agenda in global development, and a well earned reputation for staying the course with valuable strategies. Thus, it was important that integration not signal a diminished commitment to the core components of either program.

In addition, the experts noted at least one potential tension between the two programs' strategies. While the Global Development Program supports allocations based on evidence of actual needs on the ground rather than donor earmarks, the Population Program supports organizations that advocate for increased international funding of family planning and reproductive health. It may well be that special consideration must be given to aspects of development, such as family planning and reproductive health, that are ideologically controversial. In any event, the experts did not regard this as a problem with integration, but rather as an indication of the value of unifying the Foundation's various development strategies.

## **The New Global Development and Population Program**

As of this writing, the search for a director of our new Global Development and Population Program is under way. Over time, the director will doubtless develop and propose to the President and the Board some new strategies for the integrated program. He or she will not start with a blank slate, however. As approved by the Board, the Global Development and Population Program will build on the core goals of the two existing programs:

- Improving the well-being of the world's poorest people, especially women.
- Creating the conditions for equitable and sustainable economic growth in the developing world.
- Enabling women to control the number and timing of their pregnancies and protecting women and girls against gender-based violence, sexually transmitted infections, and unsafe abortions.
- Establishing the conditions for transparent and accountable governance, particularly in the financing and delivery of public services.
- Investing in human capital by ensuring that all children have the opportunity to learn in school.

All of this work will continue to be supported by data collection, research, evaluation, and training, including support for the Think Tank Initiative, impact evaluation, and the training of population scientists in African universities.

The Foundation's grantmaking will continue to support work at the global, regional, national, and, where appropriate, subnational levels. Reflecting the Foundation's significant expertise and commitments, the Program will maintain the current focus on sub-Saharan Africa, South Asia, and Mexico. Although challenges in domestic reproductive health and rights policy differ from those in the developing world, our commitment to organizations working on these issues in the United States remains strong, and support for their efforts will remain a core element of the integrated program.

As conditions in the world change and new challenges and opportunities emerge, the Program's strategies will inevitably evolve and shift. However, the integrated program will continue to reflect the core operating principles of the Foundation's international grantmaking:

- Building capacity within developing countries and providing the long-term institutional support to make this possible.
- Focusing on lasting system change and facilitating policy reforms to make this possible.
- Building the evidence base for sound policymaking.
- Thinking rigorously about goals and strategies and holding ourselves accountable through appropriate evaluations.
- Taking risks for long-term gains and learning from failures.
- Increasing the value of the Foundation's investments through collaborations with governments, multilateral and bilateral donors, sister philanthropies, the private sector, and civil societies in the South and the North.
- Seeking long-lasting impact for the greatest number of people.

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**Notes:**

\* I am grateful for the assistance of Kylin Navarro in preparing this essay.

2 United Nations International Conference on Population and Development, *Programme of Action* (Cairo, September 1994), chap. III, A (<http://www.iisd.ca/Cairo/program/p03001.html>).

3 Program directors at the Hewlett Foundation are subject to term limits.

4 We were significantly aided by Ivan Barkhorn of the Redstone Strategy Group, who had helped develop strategic plans for both programs.

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*as of December 31, 2009*

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*as of December 31, 2009*

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Program Officer

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**Linda Frey**  
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**Kevin Bohrer**  
Program Officer

**Ward Heneveld**  
Program Officer

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Program Associate

**Denise Robichau**  
Program Associate

**Erika Ramos**  
Consulting Program Associate

**Ame Sagiv**  
Program Associate

**Leanne Sedowski**  
Research Associate

**Sherri Hansen**  
Research Assistant

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**Moy Eng**  
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**Julie Fry**  
Program Officer

**Marc Vogl**  
Program Officer

**Ron Ragin**  
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**Kerry O'Connor**  
Program Associate

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**Jennifer Ratay**  
Program Officer

**Lauren Libruk**  
Program Associate

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Program Director

**Peter Belden**  
Program Officer

**Helena Choi**  
Program Officer

**Tamara Fox**  
Program Officer

**Nicole Gray**  
Program Officer

**Paul Rosenberg**  
Associate Program Officer

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**Pauliane do Couto e Silva**  
Program Associate

**Nathalie Scholl**  
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**Elisabeth Green**  
Resource Librarian

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Grants Administration

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**Jerry Griffin**  
Network & Systems Administrator

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**Lily Chiu**  
IT Analyst

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Support

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Help Desk Team Lead

**Charles Ferreira**  
Desktop Systems Specialist

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**Rena Lee**  
Applications Developer

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Senior Accountant

**Anne Park**  
Senior Accountant

**Sophie He**  
Senior Accountant

**Massooda Maqdoor**  
Accountant

**Spergon Hunt**  
Associate Accountant

**Rachel Zhu**  
Investment Operations Associate



# The Education Program in 2009



*After graduation, three Southern California friends commandeered one family's dilapidated RV and drove across the country to interview professionals whose work interested them. What started as a lark to help the three graduates find a career now may hold one key to lowering California's devastating problem with high school dropouts. Photo courtesy of Roadtrip Nation.*

## **Goals:**

- Increase economic opportunity and civic engagement by education students to succeed in a changing world through [deeper learning](#)
- improve the conditions for [education reform in California](#)
- Equalize access to knowledge for teachers and students around the globe through [Open Educational Resources](#)
- [Raise educational achievement](#) in disadvantaged communities in the San Francisco Bay Area

In 2009, the Education Program made 117 grants to 86 organizations, totaling over \$39 million.

## **The Education Program in the News in 2009:**

[Featured Website: American Institutes for Research](#)

[The Liberation of Textbooks](#)

[Taking to the Road in Search of a Career](#)

[Sowing the Seeds of Arts Education](#)

[Closing the Education Gap in America's Poorest Neighborhoods](#)

*Appendix*

Education Program's 2009 Report to the Board

# The Environment Program in 2009



*The Buffalo Fork River, located outside of Moran, Wyoming, is one of the state's finest locations for fishing. Photo courtesy of Scott Bosse and Greater Yellowstone Coalition.*

## Goals:

- [Conserve](#) the Western United States and Canada for wildlife and people
- Slow [global climate change](#) by reducing greenhouse gas emissions
- [Increase](#) renewable energy and energy efficiency
- Address the environmental problems that [disproportionately affect disadvantaged communities](#) in the San Francisco Bay Area

In 2009, the Environment Program made 123 grants to 93 organizations, totaling over \$56 million.

## The Environment Program in the News in 2009:

[EcoFlight Plies the Skies over the American West](#)

[Q&A with Michael Scott](#)

[What's Next in the Battle Against Climate Change?](#)

[Featured Website: Environmental Working Group](#)

[A Victory for Land Conservation](#)

[Protecting Forests Goes Mainstream](#)

*Appendix*

Environment Program's 2009 Report to the Board

# The Global Development Program in 2009



*Prof. Ernest Aryeetey, executive director of the Institute for Statistical, Social and Economic Research (ISSER), participates in a panel discussion at the launch of the Think Tank Initiative in Dakar, Senegal, in May 2009. ISSER is one of the institutions selected for funding under the Initiative. Photo courtesy of the Gates Foundation.*

## **Goals:**

- Improve the efficiency of agricultural markets
- Promote transparent and accountable governance around the world, with an emphasis on Mexico
- Improve the quality of education in the developing world
- Increase the amount of high-quality policy analysis created in the developing world

In 2009, the Global Development Program made 76 grants to 65 organizations totaling over \$50 million.

## **The Global Development Program in the News in 2009:**

[Featured Website: Pratham](#)

[Getting Down the Facts to Reduce Poverty in Kenya](#)

[Hewlett and Partners Pledge \\$30 Million to Strengthen African Think Tanks](#)

[Q&A with Kevin Bohrer](#)

[Featured Website: Connect U.S. Fund](#)

*Appendix*

Global Development Program's 2009 Report to the Board

# The Performing Arts Program in 2009



*C. K. Ladzekpo performs Kasum, an East Bay Center-commissioned work, during Cal Performances World Stage Series in 2005. Photo courtesy of Athena Azevedo and the East Bay Center for the Performing Arts.*

## **Goals:**

- To ensure that [exceptional works of art](#) are created, performed, and preserved
- To provide more [opportunities for participation](#) in arts experiences

In 2009, the Performing Arts Program made 127 grants to 117 organizations totaling over \$15 million.

## **The Performing Arts Program in the News in 2009:**

[Foundations - A Q&A with Ron Ragin](#)

[Featured Websites: National Summit on Arts Journalism Award Winners](#)

[Featured Website: Chitresh Das Dance Company](#)

[Sowing the Seeds of Arts Education](#)

[Foundations - A Q&A with Julie Fry](#)

## *Appendix*

Performing Arts Program's 2008 Report to the Board

# The Philanthropy Program in 2009



[Introduction to Philanthropedia You Tube Link](#)

## Goals:

- Increase and improve information available to donors about nonprofit performance
- Develop information about strategic philanthropy and share what we've learned

In 2009, the Education Program made 75 grants to 74 organizations totaling over \$6.3 million.

## The Philanthropy Program in the News in 2009:

[Making Every Philanthropic Dollar Count](#)

[Q&A with Jen Ratay](#)

[Featured Website: IssueLab](#)

[Featured Website: GiveWell](#)

[Seeking a Bigger Bang for the Philanthropic Buck](#)

## *Appendix*

Philanthropy Program's 2009 Report to the Board

# The Population Program in 2009



*In Tanzania, a crowd of people line up outside of a rural clinic operated by Marie Stopes International. The clinic can barely cope with the local population's high demand for its services. People begin gathering here early in the morning before the doors open, but still, the clinic and its health care workers may not have the capacity to see all these patients by the day's end. Photo courtesy of Paul Rosenberg, Hewlett Foundation.*

## **Goals:**

- [International Access](#) to Family Planning and Reproductive Health
- [Research, Training, and Advocacy](#) to Create Sound Policy
- Family Planning and Reproductive Health in the [United States](#)
- [Serving Bay Area Communities](#)

In 2009, the Education Program made 70 grants to 58 organizations totaling over \$41.5 million.

## **The Population Program in the News in 2009:**

[Foundations - A Q&A with Peter Belden](#)

[Getting Down the Facts to Reduce Poverty in Kenya](#)

[Featured Website: The Population and Poverty Research Network](#)

[A Wide Range of Health Care Resumes with Reversal of Federal Policy](#)

[Foundations - A Q&A with Sara Seims](#)

## *Appendix*

Population Program's 2009 Report to the Board

# Special Projects in 2009



[Force for Change You Tube Link](#)

Special Projects funding is flexible to respond to opportunities not necessarily aligned with the Foundation's core grantmaking areas. There are four general categories:

- Collaboration across programs
- General support for institutions
- Opportunistic grantmaking
- Initiatives

In 2009, the Foundation made 99 Special Projects grants to 88 organizations totaling over \$15.4 million.

## **Special Projects in the News in 2009:**

[Seeking a World Free of Nuclear Weapons: An Interview with Former Secretary of State George Shultz](#)

[Reinventing California Government for a New Century](#)

[Three Bay Area Foundations Join to Strengthen Grassroots Nonprofits Serving People of Color](#)

[Fresno Foundation's New Life Brings New Hope to a Region](#)

## **EDUCATION PROGRAM 2009 REPORT TO THE BOARD**

### **OVERVIEW**

2009 was a tumultuous year for education, marked at once by historic challenges and unprecedented opportunities. The year began with states scrambling to cut budgets in the middle of the worst recession since World War II. Schools were hit hard, particularly in California, where legislators eventually slashed K-12 funding by \$16 billion. By mid-February, however, the new administration in the White House had stepped in, more than doubling Department of Education spending by committing \$100 billion of federal stimulus funds to public schools and colleges over two years.

The Foundation responded swiftly and adapted to the changing circumstances. With Board encouragement and approval in March, the Education Program created a new cluster of grants to help states and districts use the stimulus funds strategically. We streamlined our usual grant process, and by June we had awarded nearly \$4 million to projects aimed at steering stimulus money into reform initiatives designed to make a lasting impact on student achievement. At the same time, we narrowed our focus to the issues we could best leverage in hard times: reforming California's unwieldy school finance structure, building robust student data systems, increasing college readiness, and encouraging the spread of Open Educational Resources.

### **2009: Capitalizing on Success**

Despite the turmoil, the Program can report many achievements in 2009:

- After seven years of substantial Hewlett Foundation funding, one of our most successful projects, Open Educational Resources (OER), is rapidly climbing toward institutionalization. It has gained recognition as a valued movement worldwide, in part because it is seen as a cost-effective tool for spreading knowledge. Federal and state governments began funding projects this year, and UNESCO acknowledged OER's value in its July higher education communiqué.
- In California, our data system work is nearing completion: soon the state will have sound information on which to base its education policy decisions. The California Longitudinal Pupil Achievement Data System, designed to link K-12 data with higher education and other government data, went online in August. A teacher data system is expected to roll out in 2011. Community colleges also have strengthened their data gathering and sharing networks.

The Program's goal to establish the groundwork for college readiness programs also has passed major milestones. Thanks to the work of the American Diploma Project, supported by the Foundation, leaders of California's K-12 and higher education systems have reached tentative agreement on a common definition of college readiness. Next they will turn their attention to a coordinated implementation plan. The Foundation was also an early funder of "bridge" programs to help underprepared community college students make a successful transition from remedial courses to college-level classes and on to degrees and careers. By 2011, the Digital Bridge



Academy and the Career Ladders Project—co-funded with the Gates, Irvine, and Stuart foundations—are expected to be operating in more than half of California’s community colleges.

Finance reform made noteworthy progress this year, too, when the legislature consolidated two-thirds of the state’s K-12 categorical funding programs. The momentum toward flexible funding makes 2010 a good year for one last big push for finance reform. The legislature also passed a bill that would have redesigned the state’s finance formula for allocating funding to schools in order to better serve the neediest students, but the governor vetoed it. We expect this measure to come up again next year.

We also took advantage of a unique historical moment in federal education policy, investing \$4 million to help states and districts use one-time funds under the American Recovery and Reinvestment Act. Our grants helping education professionals and the public understand how stimulus money is being spent were well-timed: stories and blogs about the stimulus are the most popular content on *Education Week’s* Web site while traffic has increased tenfold on The New America Foundation’s EdMoney Watch blog since the stimulus was approved. Nearly 1,000 California school district representatives attended two June meetings on the stimulus hosted by the California County Superintendents Education Services Association, and 300 more participated in a July webinar.

Early signs also indicate that our grants are helping promote better decisionmaking in school districts in the wake of stimulus funding. Those receiving direct technical assistance from grantee Education Resource Strategies are consistently reporting the use of innovative resource allocation strategies in their districts.

### **2010: A Year of Transition**

Against this backdrop, we began a comprehensive strategic planning process in June and expect to post the results of this thinking in 2010.

It is already evident that this is a particularly opportune time to capitalize on the successful culmination of existing investments and to consider new ways to evolve the Program’s strategy. Significant changes in the world of education since the 2002 strategic plan was completed bring fresh opportunities to improve student achievement at all levels.

As a consequence, we envision 2010 as a year of transition for the Program, as we begin to shift our strategy to new initiatives:

- Support for our highly successful OER infrastructure projects, such as Creative Commons and the OpenCourseWare Consortium, will continue, until the field becomes self-sufficient.
- In California, providing it is possible to identify high-impact leverage points, we propose to ramp up our investments in organizations working on revising the state’s governance and budget processes, in the hope that the tough year ahead will provide the impetus for fundamental reforms. Beginning in 2011, however, Hewlett Foundation funding will be reduced as a result of the expected completion of the data systems initiative, coupled with challenges in our other focus areas caused by the state’s fiscal crisis. We plan to pursue a

smaller but sustained investment in California, continuing the search for new solutions and opportunities that can be pursued when the state's fiscal and governance issues have been resolved.

Finally, we expect in 2010 to begin initial funding of ideas that emerge from the strategic planning currently under way. In keeping with the Foundation's heritage of long-term thinking, we are exploring a question with implications stretching to 2025 and beyond: how the education system must evolve so children who enter kindergarten today can acquire the knowledge and skills they will need to succeed economically and participate in civic life when they leave college in 2025. The world they encounter will be very different from the one we know now.

This budget memo outlines in detail what we plan to pursue in 2010 and beyond for each component of the current Education Program strategy.

### **COMPONENT: Improving California Education**

**ULTIMATE GOAL:** Significantly improve the educational outcomes of California students as measured by high school graduation rates; college readiness of high school graduates; remediation rates of low-skilled community college students; and transfer and completion rates of community college students.

**THEORY OF CHANGE:** Our theory of change relies on improving state education policy and creating mechanisms for continuous improvement at the local level. Specifically, we aim to support organizations working to improve state policy and local practice in the following ways:

1. Redesign education finance systems for schools and colleges
2. Improve education data quality and use
3. Increase college readiness

A fourth area of investment—general support for think tanks, advocates, media organizations, and other nonprofits—supports the infrastructure essential for developing good education policy.

### **Redesign Education Finance Systems**

**GOAL:** Redesign state education finance systems by making categorical funding programs more flexible, revising the K-12 and community college finance formulas to better support underserved students, and increasing overall K-12 funding.

#### ***Progress in 2009***

California's most severe fiscal crisis since the Great Depression dealt schools and community colleges a stunning blow in 2009.

By the time Governor Arnold Schwarzenegger and the legislature finally approved a budget in July, state elementary and secondary school funding had been slashed by \$16 billion. Perhaps \$8 billion will be replaced by federal stimulus funds over the next two years. Still, some 27,000 teachers—8 percent of the workforce—were laid off, and the minimum required school year was

cut by five days. Many districts increased class sizes—to as high as forty-four students in a handful of districts. Los Angeles Unified cancelled summer school for 225,000 students, and many other districts did the same. Vacaville eliminated school buses for everything but special education. When all the cuts are tallied, California, which was ranked 47<sup>th</sup> in the nation in school spending per pupil, is expected to drop to 49<sup>th</sup> place.

Meanwhile, the state's 110 community colleges lost more than \$680 million, the largest budget cut in the system's history. Altogether, the colleges lost 20 percent of their funding, even counting an \$80 million increase in student fees and \$37 million in one-time federal stimulus money. Funding was reduced by 50 percent for categorical programs, which are narrowly targeted to specific uses and come burdened with bureaucratic reporting and compliance requirements. The Legislature and Governor attempted to mitigate the categorical program reductions by adopting "flexibility" provisions which were designed to allow colleges to shift funding between these programmatic silos in order to retain a modicum of services to students. Colleges responded by laying off faculty, curtailing student services, and closing classes, effectively cutting enrollment.

Although the fiscal upheaval was traumatic and set back work on increasing funding for schools and colleges, the combination of the state fiscal crisis and the reform requirements contained in the federal stimulus funding opened a window to realize some fundamental reform goals for California education in the short term. Primary among those goals are overhauls of the state's education finance and data systems, which we consider keys to any long-term improvement in rates of high school graduation and college attendance.

Hewlett Foundation grantees' efforts to redesign state education finance systems received a tremendous boost in February, when the legislature approved the most substantial shift since the 1970s toward more flexible funding for categorical education programs. The move to waive restrictions on two-thirds of the state's sixty-three categorical programs for K-12 schools dramatically increased the ability of local districts to spend money on projects that more closely match their students' needs. Although legislators cut funding for these programs by about 15 percent, their decision to give districts more autonomy in spending what was left meant almost \$5 billion in K-12 funding is now unrestricted for each of five years.

The Long Beach Unified School District plans to spend about \$1.2 million of that money this year in a pilot project aimed at sixth graders who have been held back at least a year or are new to the district and performing poorly. About 250 students have been placed in small, self-contained literacy classes with the goal of bringing them back up to grade level in one school term. The reforms have been led by superintendant Chris Steinhauser, whose district won a Broad Prize for exemplary urban schools in 2003 and was a top candidate again in 2009.

At the community college level, the legislature granted more local flexibility in spending on all categorical programs, an important step toward the financial restructuring our grantees advocate. Moreover, legislators did not cut categories aimed at underserved students as much as they did other programs.

In another promising development, the legislature authorized a commission to redesign state elementary and secondary funding formulas. Unfortunately, the bill was vetoed by Governor Schwarzenegger, but just getting it to his desk was a major accomplishment. Targeting education funding more effectively to the most needy students, a goal of this proposed commission, is a central recommendation of the *Getting Down to Facts* report issued by Stanford University researchers in 2007 with support from Hewlett and the Gates, Irvine, and Stuart foundations.

Progress on finance reform was more limited at the community college level. Although the new categorical flexibility was a victory, the governor failed to get legislative support for his proposals to eliminate rules dictating faculty composition and the proportion of funding spent on direct instruction. Those policy changes have been recommended by Hewlett Foundation-funded grantees and policy makers as important steps toward granting colleges flexibility to respond to local needs.

Good news came in July, when President Obama and Education Secretary Arne Duncan introduced the American Graduation Initiative, a major proposal to spur community college innovations to boost student achievement, matriculation, and graduation rates. Subsequently, the House adopted a \$12 billion ten-year package, which includes \$2.5 billion for new construction and \$9 billion in competitive “challenge” grants to colleges designing innovative new programs or revamping existing ones. Also in the package was a \$500 million online education provision to create and disseminate open Web-based courses to help more students earn credentials. This legislation is unprecedented in the history of federal community college funding and could provide community colleges with much-needed federal reform support when state funding is declining.

### ***Plans for 2010***

In 2010, we are considering a push to fund organizations whose work includes new K-12 education finance reform in California. The effort also would include support for organizations that advocate changes in the funding formula and other reforms recommended by the *Getting Down to Facts* research. In the meantime, we are closely watching a developing litigation settlement that could prove a powerful mechanism to generate new funding and new formulas for targeting funding to needy students.

### **Improve Education Data Quality and Use**

**GOAL:** Improve data quality and use by building a robust K-12 data system and requiring community colleges to report outcomes for underprepared students.

### ***Progress in 2009***

One of the brightest success stories of 2009 was the launch of a new data system created to track California students from preschool through college. Designed in large part according to the McKinsey report commissioned by the governor and the Department of Education and funded by the Hewlett and Gates foundations, the California Longitudinal Pupil Achievement Data System went online in August. The system is intended to provide data about student performance over

time that never before has been available at the state level. Eventually it will link K-12 data with higher education and other government data on social services and the workforce for a better picture of how students fare as they move through the state's schools. A linked teacher data system is expected to roll out in 2011.

On the premise that good schools require solid data to make informed policy decisions, the Foundation has made improving data collection and analysis a cornerstone of its education strategy in the Golden State. Although this year's goal for a \$30 million to \$75 million state investment in data systems and local data collection fell prey to massive budget cuts, the federal government contributed \$15.5 million toward California's student and teacher data systems. In order to qualify as well for \$5 billion in competitive federal stimulus funds, the legislature passed and the governor signed a new law removing barriers to linking student and teacher data for the purposes of teacher evaluation. The California Teachers Association had previously opposed the linkage.

Community colleges also are making solid progress toward strengthening their data systems. This winter, the chancellor is scheduled to activate a data warehouse designed to standardize the tests that colleges use and make it easier to analyze entering students' performance on placement tests. The Gates Foundation is co-investing in the warehouse project, which is expected to provide important longitudinal data so colleges can track the performance of students in remedial courses for the first time.

### *Plans for 2010*

In 2010, we plan to wrap up our initiative on data quality and use. Foundation grantees are working with community college researchers and presidents to improve the use of data, with an emphasis on increasing the number of students who stay in college and earn a credential. Data management tools developed with Foundation funding allow colleges to track groups of underperforming students. Grantees also have developed new measures of student performance that all colleges will collect and report in 2010. Together with the data warehouse, these initiatives will dramatically improve colleges' ability to increase completion rates by identifying barriers to students' successful transition from remedial to college-level classes.

### **Increase College Readiness**

**GOAL:** Improve policies and incentives for college readiness by preventing high school dropouts, establishing shared college readiness standards, and implementing effective practices for basic-skills students in community colleges.

### ***Progress in 2009***

California's future is inextricably tied to its workforce, making the issue of college readiness more timely than ever in this year of desperate finances. While the governor and legislature battled over budget cuts, we saw notable progress toward the goal of establishing systems designed to increase the number of students prepared to do college-level work. The legislature approved a new law requiring an annual report on the "early warning indicators" of high school

dropouts, and the state Board of Education began work on redesigning its policies to encourage schools to offer Algebra I (a key gateway course for college preparation) to more students by ninth grade.

This year, the CalPASS data-sharing consortium, which promotes consistency between high school and higher education standards, expanded to every community college, 85 percent of universities, and 70 percent of K-12 and high school districts. In addition, the top executives of California's K-12 schools and three higher education systems reached a tentative agreement through the California Diploma Project to establish the state's Early Assessment Program (EAP) as the common definition of college readiness. The EAP test, which helps eleventh graders determine whether they are ready for college-level work, would provide the first consistent message about higher education's expectations. Today, when many high school students enter college, they find they must retake classes they had passed in high school, which leads to their taking longer to graduate or dropping out.

Hewlett also has joined the Gates, Irvine, and Stuart foundations in supporting the creation of two community college bridge programs aimed at moving underprepared students from remedial basic skills classes through college-level courses and on to degrees and careers. Together, the Digital Bridge Academy (DBA) and the Career Ladders Project are expected to help students in more than half of the state's community colleges by 2012.

The programs have proved remarkably successful. Researchers from Teachers College, Columbia University, found that participants in the Cabrillo College DBA in Aptos were 25 percent more likely than similar students to enroll full-time in succeeding semesters and 40 percent more likely to complete transfer-level English courses.

"It totally changed my life," says Andres Medina-Huezo, 25, who enrolled in Cabrillo's DBA in 2005 and plans to transfer to UC San Diego in 2010. Not only did his reading and writing improve in DBA courses, Medina-Huezo says, but he also gained self-confidence: "It helped me discover who I was and where I wanted to go."

### *Plans for 2010*

In 2010, we propose to make a concerted push for a new student success center with the goal of increasing college readiness by improving reading, writing, and math instruction. We also envision a renewed investment in the California Diploma Project for the next phase of its work to implement and expand student participation in the EAP as the common definition of college readiness.

## **Support Infrastructure for Effective Policymaking and Governance Reform**

**GOAL:** Reinforce the infrastructure essential for developing good education policy and support projects aimed at improving California governance systems.

### *Plans for 2010*

We recommend making investments in 2010 in organizations working to improve California's problems in the state's budget and political governance systems, if it is possible to identify high-leverage investments. These deeper problems are holding the state back from making faster, more substantial improvements in education. Grants in this area would be designed in coordination with California Forward, a strong grantee that is leading statewide reform efforts in this area.

### **COMPONENT: Open Educational Resources (OER)**

**ULTIMATE GOAL:** Equalize access to knowledge for teachers and students around the globe and improve the practices of teaching and learning.

**THEORY OF CHANGE:** At the heart of the OER movement is the simple and powerful idea that the world's knowledge is a public good and that technology in general, and the World Wide Web in particular, provide an extraordinary opportunity for everyone to share, use, and reuse knowledge.

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To shift education to a more open paradigm, the OER movement must establish a self-sustaining infrastructure capable of successive improvements in OER development and delivery. Building such an infrastructure requires investments from multiple funders in four key components: (1) core agencies that develop OER content and reinforce openness in education, (2) networks that proliferate OER, (3) guidelines that support OER quality and intellectual property rights, and (4) research that demonstrates the impact of OER on teaching and learning.

OER also can serve as a platform to support innovation in education by allowing teachers and learners to engage in the process of knowledge and content development. We seek to use demonstrations of OER's potential to catalyze educational innovation in order to improve the practices of teaching and learning.

### **Support Development of a Robust Infrastructure**

**GOAL:** Support the development of a robust infrastructure to sustain OER beyond Hewlett's involvement, as measured by increased rates of openly available, high-quality educational materials; access and usage of open educational resources; and participation in the OER movement.

### ***Progress in 2009***

Seven years after the Foundation launched the OER Initiative, the movement to share knowledge through technology has made impressive progress toward becoming a significant force in education worldwide. Although the global recession of 2009 brought unexpected fiscal challenges to some core grantees, it also created opportunities to expand the role of OER's cost-effective, Web-based technologies in teaching and learning. At the same time, new public, private, and philanthropic investments helped increase momentum toward a network that can stand on its own.

Hewlett Foundation-funded projects reported strong progress this year, even in the face of financial setbacks. More than 250 million Creative Commons licenses were adopted, nearly twice as many as in the previous year, and the OpenCourseWare Consortium expanded its offerings by 50 percent to 9,000 courses. Meanwhile, the Teacher Education in sub-Saharan Africa (TESSA) consortium increased its locally developed courses from three to twenty-three, picked up additional funding to develop courseware for countries not in the consortium and was awarded the Queen's anniversary prize in recognition of its excellent work.

The most encouraging steps toward a sustainable OER movement, however, may be the entry of federal and state governments into the field. In April, OER gained a strong voice in the Obama administration when Secretary of Education Arne Duncan tapped Martha Kanter, chancellor of Foothill-DeAnza Community College District, an OER grant recipient, to be undersecretary of education. Kanter was the principal investigator on the district's Open Textbook project and the leading force behind the nationwide Community College Consortium for OER. She was instrumental in designing the president's July proposal to invest \$50 million a year for ten years for the creation of open online courses at high schools and community colleges.

The Department of Education has also included OER among the projects eligible for a portion of the \$5 billion in "Race to the Top" stimulus funds, and the White House has adopted Creative Commons licenses for [whitehouse.gov](http://whitehouse.gov) and many other administration offices.

At the state level, Virginia launched the first statewide OER effort this year and worked with the Khosla Foundation to adopt an open physics textbook. Soon thereafter, Governor Schwarzenegger announced the California Open Textbook initiative with sixteen textbooks available to districts in the fall of 2009.

The Foundation's ultimate objective is to create an OER movement for which it underwrites less than 10 percent of project funding. We moved closer to that goal in 2009 when other prominent foundations accelerated their funding in the field. The Gates Foundation funded more than \$10 million in OER projects, the MacArthur Foundation co-funded \$2 million in OER-based initiatives, and Lumina Foundation has funded \$1 million. The Omidyar Network also recently committed \$2 million in unrestricted funds to support the Wikimedia Foundation, a new Hewlett Foundation grantee. In another promising development, the Rice University Connexions platform moved to a consortium-based model and began generating revenue.

### *Plans for 2010*

We propose to support continued growth of OER in 2010 through the development of our core agencies, networks, guidelines, and research. At the same time, we envision a push to diversify funding and revenues for the movement even further.

#### *Core agencies and networks*

A primary goal for 2010 is to ensure stable funding for core organizations and encourage the development of networks of states to take advantage of new federal initiatives in OER.



### *Guidelines*

As part of our mission to develop guidelines for the movement, we propose to focus on establishing additional standards for online courses in community colleges. Those standards should help provide a structure for spending federal funds. In conjunction with the University of Toronto, we also would like to launch the OER Accessibility strategy to open up OER to people with disabilities. Finally, we suggest taking advantage of the new Google Analytics project to collect comparable site usage data from all grantees.

### *Research*

We recommend launching at least six projects with the OLnet research network to evaluate the impact of OER on teaching and learning. We also plan to initiate at least two research projects focused on the role of software design in reaching the learners we are trying to help with information technology.

## **Demonstrate OER's Added Value to Teaching and Learning**

**GOAL:** Demonstrate the potential of OER to improve teaching and learning. Each demonstration cluster needs different qualitative and quantitative metrics to measure near and long-term success.

### *Progress in 2009*

Now that high-quality content is widely available on the Internet, it is more important than ever to demonstrate the benefits of OER and collect evidence of its impact on teaching and learning. The OER demonstration projects supported by the Foundation use locally developed content as often as possible and deliver content any time, anywhere there is demand for the material. In 2009, the Foundation continued to support Open Textbook projects as well as the Open Gaming cluster, which entered a heavy development phase. We also extended funding for the Teacher Training cluster, possibly a significant component in the Program's strategy currently under consideration. We will analyze data gathered from these demonstration projects to determine best practices that should be widely adopted.

### *Games-based environments for teaching complex materials*

2009 saw the successful launch of the Learning Games Network (LGN), which was spun out of the MIT Game Arcade. With a large grant from the Foundation, LGN began developing the Open Language Learning Initiative (OLLI) platform. This platform will support the existing "Forgotten Worlds" English-Chinese language-learning game. Work on a new game for Spanish language learning has begun, and plans call for the game to debut in 2010. LGN also successfully secured over \$1 million in funding from the U.S. State Department for the OLLI project.

2010 will likely see limited new activity in the Open Gaming portfolio as projects concentrate on the development work already funded.

### *Open textbooks/courses*

The Foothill-De Anza Community College District Open Textbook project was completed with great success in 2009. Students eagerly adopted the first free, open, online textbook,

“Collaborative Statistics,” saving over \$80,000 in just one semester. The open nature of the book also led to a number of innovative practices, including the blog of a student outside the project who reviewed the textbook while he was teaching himself statistics. It was one of the first cases of an actual learner providing direct feedback and evaluation of a textbook in real time.

In 2010, we hope to increase production of open textbooks and begin to evaluate their impact on online learning. This coincides with an anticipated wave of federal and state support for online texts, including a proposal by Illinois Senator Dick Durbin calling for \$25 million in federal funding and California’s plans for sixteen new, open, digital textbooks for high school science and math courses. We also suggest moving more aggressively into K-12, where there appears to be an opportunity to get significant traction, given the infusion of new government dollars into education.

### *Teacher training*

Teacher training is one of the critical issues confronting nations rich and poor in every corner of the world. While developing nations of South Asia and sub-Saharan Africa face the daunting task of preparing 14 million to 25 million new teachers by 2015, industrialized countries such as the United States seek effective ways to help experienced teachers continue their professional education and participate in curriculum development and assessment. OER demonstration projects backed by the Foundation play key roles in addressing both types of problems.

In sub-Saharan Africa, OER has proved a cost-effective and expandable vehicle for teacher training that can be customized to meet the needs of local institutions. By the end of 2009, more than 200,000 new teachers will have participated in OER training through the Teacher Education in sub-Saharan Africa project before beginning work. A number of established instructors using TESSA OER also are beginning to experiment with small changes in pedagogy, engaging students in hands-on learning instead of traditional lecture-based classes.

In 2010, partner institutions plan to track and evaluate the use of TESSA OER in their programs, paying close attention to changes in teaching practices and student learning. Among the enthusiastic converts is Jenestar Wanjiru Mygai, who teaches at the Kagoto Primary School on the outskirts of the town of Nakuru, Kenya. She tells of improving her students’ creative writing skills with a TESSA lesson calling for a story written from the perspective of a crocodile. “The learners felt very much at home using the TESSA materials,” she reports. “They actively participated, and that feeling of success was written all over their faces. I also realized that creative writing can be made easier, livelier, and fun.”

In the United States and around the globe, OER also serves as an important tool for creating networks of teachers for continued professional learning and collaboration on curriculum and assessment. Such networks contribute to higher student achievement, according to a recent study by the National Staff Development Council. It concluded that nations that invested heavily in teacher learning networks also posted the highest student scores on international assessments such as the Programme for International Student Assessment and Third International Mathematics and Science Study.

The OER Initiative supported several teacher learning networks in 2009, among them Teachers Without Borders and OER Commons. Scholastic's TeacherShare project, launched this year, is particularly exciting. Not only is it a private-public partnership that could influence the educational publishing industry, but it introduces OER to Scholastic's network of 2 million K-12 teachers. 2010 will be an important year to evaluate the success of these networks and, based on the proliferation of OER, recalibrate the projects as necessary.

*Plans for 2010*

In 2010 we recommend continuing to support Open Textbooks and Teacher Training clusters while shifting the other demonstration clusters to support our new strategic direction. One of the new areas that we are exploring for 2010 is peer-to-peer learning environments.

**COMPONENT: Opportunity**

**GOAL:** Continue to support areas of inquiry that can have substantial impact but arise on short notice.

**COMPONENT: Serving Bay Area Communities**

**GOAL:** Support local organizations to strengthen our overall goal consistent with our new strategy.