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*The William  
and Flora  
Hewlett  
Foundation*

# Statement of Purpose

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The William and Flora Hewlett Foundation has been making grants since 1966 to help solve social and environmental problems at home and around the world.

“Never stifle a generous impulse,” was a favorite saying of entrepreneur William R. Hewlett, who established the Hewlett Foundation with his wife, Flora Lamson Hewlett, and their eldest son, Walter B. Hewlett. Indeed, it was the personal generosity of Mr. Hewlett, who passed away in 2001, and Mrs. Hewlett, who passed away in 1977, that has made the Hewlett Foundation one of the nation’s largest grantmaking foundations, with assets of more than \$7.3 billion as of December 31, 2005.

**In 2005, the Hewlett Foundation awarded \$178,405,974 in grants and disbursed \$319,916,093 in grant and gift payments.**

The Foundation concentrates its resources in education, environment, global development, performing arts, philanthropy, and population, and makes grants to support disadvantaged communities in the San Francisco Bay Area.

The Foundation’s work is informed by three fundamental values:

- First, the Foundation is concerned primarily with solving social and environmental problems. This requires the staff to define Program objectives, grants, and other activities in terms of problems to be solved; to identify indicators of progress and criteria for evaluating success; and to be prepared to stay the course.
- Second, because the solutions to serious problems are very difficult to predict, the Foundation must be prepared to experiment and take risks in its philanthropic activities. This, too, entails clear objectives and measures of success, without which staff cannot know how the risk eventuated. It also requires a willingness to acknowledge and to learn from failures.
- Third, grantee institutions are essential partners in achieving the Foundation’s mission. This explains the high proportion of the Foundation’s grants budget allocated to general operating support. It further implies our concern not only for the health of individual organizations, but also for the fields in which they operate.

The William and Flora Hewlett Foundation is wholly independent of the Hewlett Packard Company and the Hewlett Packard Company Foundation.

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# *On Collaboration (Or How Many Foundations Does It Take to Change a Light Bulb?)<sup>1</sup>*

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a foundation operates in a social and economic space with many other actors. Merely being aware of their presence creates opportunities to coordinate resources to achieve common ends. And in some circumstances, actual collaboration can significantly increase the participants' impact in addressing social problems.

The Hewlett Foundation's collaborative grantmaking has increased greatly in recent years. This essay gives some examples of our collaborative work and takes stock of what we have learned in the process. In brief: Foundations can work together to generate better ideas and build broader constituencies as well as increase the amount of money available to address common goals. However, collaboration has inevitable up-front costs in the time and effort spent in communicating and making decisions together with one's partners. The process can often be frustrating, and a beneficial outcome is hardly assured. At the end of the day, the extra effort is justified only if it has greater impact in improving people's lives.

## *The Aggregation of Financial and Other Resources*

Since foundations are essentially investors, our most fundamental form of collaboration is the aggregation of dollars to make things happen on a scale beyond what any single funder could accomplish. For example, in 2002, Goldman, Hewlett, Moore, and Packard\* joined with the federal and California state governments to purchase 16,500 acres of salt ponds in San Francisco Bay and restore them to wetlands and tidal marshes. The properties cost \$100 million to acquire, with an additional \$35 million needed for initial stewardship and restoration planning. The project lay beyond the budget of any one of the participating foundations, but thanks to the collaboration, the salt ponds are well on their way to restoration.

Scale is also a crucial determinant of success in the effort of a half-dozen foundations—Hewlett, Moore, Packard, Rockefeller Brothers, TOSA, and Wilburforce—to assist eight First Nations, the province of British Columbia, and the Canadian federal government in protecting twenty-one million acres of temperate rainforest on the central coast of British Columbia. The Great Bear Rainforest project is costly. The total private contributions amount to \$60 million, with

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\*The full names of all foundations mentioned are listed at the end of this essay.

half of the funds coming from the foundations and the remainder being raised from individual donors by The Nature Conservancy. The provincial government of British Columbia and the Canadian federal government are matching the private contributions.

Besides increasing the aggregate number of dollars, collaboration can provide funds of different sorts and at different times. For example, in addition to making outright grants for the Great Bear Rainforest project, Packard made loans in the form of program-related investments that were crucial to keeping the deal moving along.

Foundations can bring intellectual and reputational capital as well as dollars to the table. At the request of California's governor, legislature, and superintendent of public instruction, Gates, Hewlett, Irvine, and Stuart are funding a major study of the state's school finance and governance system. In addition to providing \$2.5 million to fund policy-relevant research, the funders are contributing their staffs' considerable expertise to address these fundamental educational issues. By signaling its nonpartisan nature, the foundation collaboration has also helped create trust and confidence in the study.

### *Collaborations Including Government Organizations*

While I will mention some entirely private collaborations below, these examples suggest that foundations can help governments undertake projects that they might find difficult to tackle alone. They can support agencies in new ventures and provide flexible funding where government expenditures are restricted. The Great Bear Rainforest and the San Francisco Bay salt ponds collaborations exemplify private-public partnerships, with the private monies being matched by substantial government funds.

Together with Gates, Packard, and Wallace Global, the United States Agency for International Development, and the United Nations Population Fund, Hewlett funded an initiative to ensure the availability of contraceptives in developing countries; and we are working closely with the United Kingdom and French development agencies to examine the role of population and reproductive health in the development of the world's most vulnerable countries.

Our Education Program collaborates with UNESCO to make educational materials freely available worldwide on the Web. With Hewlett support, UNESCO staff have convened widely attended

meetings on open educational resources, and the African Virtual University<sup>2</sup> has made the distribution of open content in Africa a central element of its strategic mission. And together with the Dutch, Swedish, and U.K. governments and the World Bank, we are funding a Commission on Growth—an effort by renowned economists and ministers from a diverse group of developing countries to understand the determinants of economic development in the vacuum left by the discredited “Washington Consensus.”

Private funds can sometimes help governments make investments that have little immediate political salience, but promise to have large payoffs in the long run. For example, the lack of rigorous impact assessments has led to billions of dollars being wasted on ineffective development practices. In 2005, Gates and Hewlett supported the creation of an Evaluation Working Group, led by the Center for Global Development, to encourage development agencies and governments to carry out independent impact assessments and use them to design future interventions. The Development Assistance Committee of the Organisation for Economic Co-operation and Development (OECD) has taken up the recommendations of the working group to see how its donor country members can support impact assessments of aid-financed programs. Donor-funded evaluations seldom involve rigorous assessments of whether programs actually produce the desired outcomes. Our shared hope is that the efforts of the Evaluation Working Group will lead to donors systematically setting aside funds for impact evaluations of key development interventions.

### *Intermediary Organizations and Common Funds*

Although collaboration often consists of foundations coordinating individual grants to common grantees, another useful form of collaboration is creation of a common pool of resources to be strategically regranted. For example, participants in the Great Bear Rainforest project established a Coastal Opportunity Fund, on which First Nations tribes can draw to develop sustainable practices for extracting natural resources. And together with the U.S. Congress, Ford, Hewlett, and MacArthur established the International Media Development Fund, which supports independent television documentaries that bring diverse American viewpoints to foreign audiences and foreign viewpoints to American audiences.

With a staff of twenty-four in San Francisco and Beijing, and an annual budget of \$25 million, the Energy Foundation may be the largest intermediary organization created by a group of foundations. The Energy Foundation regrants funds from Hewlett, MacArthur, McKnight, Mertz Gilmore, and Packard to domestic and international nonprofit organizations to promote energy efficiency and conservation. Instead of each foundation having to hire program staff with expertise in the arcana of the energy field—utility regulations, carbon treaties, auto regulations, etc.—they built a common resource at the Energy Foundation. In addition to creating administrative economies of scale, this gives energy sector grant applicants a large, steady source of funding and one-stop shopping.

### *Sharing Knowledge*

Funders with common aims regularly share information in affinity groups—for example, Grantmakers in the Arts—as well as through informal exchanges. Hewlett Foundation staff meet annually with the presidents and program directors of peer foundations concerned with international family planning and reproductive health, and our Education Program routinely invites colleagues from other foundations to its annual meetings with grantees.

The Partnership for Higher Education in Africa combines sharing knowledge with joint funding. In 2005, Hewlett and Mellon joined the Partnership, which has pledged a total of \$200 million over the next five years to further the development of higher education in nine African countries.<sup>3</sup> The Partnership's most significant accomplishment to date has been providing Internet bandwidth at affordable prices to African universities in desperate need of essential resources for research and teaching.

Connect US is both a common fund and a vehicle for sharing knowledge. A donors' collaborative launched in 2004 by Ford, Hewlett, Mott, Open Society Institute (OSI), and Rockefeller Brothers, Connect US supports organizations working in the foreign policy arena. Its participants are concerned with a wide range of global issues—including human rights, health, security, economic development, environmental protection, democracy, and good governance—and share a common vision of the importance of effective U.S. engagement in an increasingly interdependent world. Connect US enables the organizations to draw on each other's

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resources and skills, develop complementary strategies, and craft mutually reinforcing messages.

### *The Dynamics of Collaboration*

*Origins.* The Hewlett Foundation has often benefited from other foundations bringing opportunities to our door. For example, our funding of the Aspen Institute's seminar for congressional legislators originated in the Ford Foundation's invitation to join in supporting its long-standing grantee. Ithaka was the brainchild of the Mellon Foundation, which approached us to create a new organization focused on information technologies to benefit higher education. And we were approached by the MacArthur Foundation to help found Security Council Report (SCR), which disseminates reliable analysis of issues that face the United Nations Security Council. (Funded by the governments of Canada and Norway as well as Hewlett, MacArthur, and Rockefeller, SCR is yet another example of a public-private partnership.)

On the other side of the coin, together with Packard, Hewlett was an early leader in the Great Bear Rainforest venture and reached out to bring others to the table. Similarly, we initiated a project, later joined by Atlantic Philanthropies and Gates, to promote and evaluate school reform in San Diego. We enlisted Carnegie and Rockefeller Brothers to fund a program to bring visiting scholars from Islamic countries to U.S. college campuses. We also took the lead in a collaboration with Gates and Packard to ensure that issues of family planning and reproductive health were incorporated into the United Nations Millennium Development Goals.<sup>4</sup>

And, of course, projects are often conceived jointly or taken to a new stage collaboratively. For example, in 2002, OSI established Revenue Watch to improve accountability in natural resource-rich countries through increased transparency of government revenues and expenditures. Hewlett and OSI have now joined to expand this work to promote transparency in a broader group of countries.

*Reciprocation.* Does collaboration entail reciprocation? Suppose that the Jones Foundation persuaded the Smith Foundation to join in a project that nicely fit both of their priorities. Smith now brings a collaborative proposal to Jones that is within Jones's general mission, but not central—and Jones does not reciprocate. Now Jones

brings Smith another solid, mission-oriented proposal. How should Smith respond?

From a logical point of view, if Jones has good strategies and is a good partner in implementation, Smith should be willing to collaborate even if Jones *never* reciprocates—just as an individual investor might follow Warren Buffett's investment strategies, or indeed buy shares in Berkshire Hathaway, even if Mr. Buffett pays no attention to her investment ideas. Realistically, though, foundation staff have egos and tend to get annoyed if their proposals are continually rebuffed, and this counsels a bit of flexibility in the interests of reciprocity.

*The allocation of tasks among funders.* Grantmaking involves a number of labor-intensive activities, including due diligence, monitoring, and evaluation. Avoiding duplication of these efforts can save both the funders and grantees time and money. Moreover, the allocation of responsibilities can take advantage of funders' different strengths. For example, we have collaborated with a number of Bay Area foundations that have on-the-ground knowledge about disadvantaged communities in the region; our own contributions consisted of dollars and expertise in strategic planning and evaluation. We also collaborated with The San Francisco Foundation (TSFF) in a mini-grants program to assist grassroots organizations in addressing state-level issues of education finance. The collaboration drew on TSFF's experience with these groups and its capacity to administer a small grant program. In addition to providing funding, we brought knowledge of state budget issues to the table and helped shape the substance of the program.

To delegate any aspect of its grantmaking responsibilities, a funder must have considerable confidence in its peers: confidence that ultimately can only be developed—and on occasion is diminished—through ongoing professional relationships. Because of our confidence in Mellon's president and cognizant program officer, we ceded considerable responsibility for due diligence in the initial collaborative grant for MIT's OpenCourseWare (OCW) project, which has made materials for more than 1,250 courses freely available on the Web. (Hewlett has taken the lead in succeeding grants.) Similarly, it was our relationship with MacArthur and our trust in its president's expertise in international affairs that encouraged us to follow its lead in establishing Security Council Report.

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### *The Costs of Collaboration*

I have discussed the potential benefits of collaboration. But what of its costs? From the funders' perspective, the greatest cost is the amount of time that collaboration can take. The time consumed is a function of the number of collaborating funders, the number of staff members tasked to the joint enterprise, the participants' willingness to compromise on matters of procedure and substance, and the internal structure and leadership of the group.

*Group decisionmaking.* Decisionmaking by consensus is not an efficient process. Therefore, the greater the number of participants, the greater the need to attend to the internal structure of the group and accord some deference to a steering committee or even a lead funder. Of course, agreeing on procedure itself takes time, but it has great potential payoff: In the absence of an agreement, procedural issues tend to be recycled ad nauseam.

*Compromises.* Every foundation has its own procedures, ranging from how it conducts due diligence and what it expects in terms of reporting, monitoring, and evaluation, to the particular forms and documents it has designed for those purposes. Individual participants' insistence on doing everything "our way" is a time-sink and certain to drive grantees to distraction. Realistically, participants must make compromises, some even verging on substance, as long as they are assured of getting their money's worth.<sup>5</sup>

*The external costs of individual collaborators' internal dynamics.* The "too many cooks" phenomenon addressed in the preceding paragraphs is affected not just by the number of participating foundations, but by their internal dynamics. A program officer wants both to be a good colleague in the collaborative enterprise and to please his own CEO, without always knowing what her pleasure is. And if the CEO has not been paying close attention to the process from the beginning, there's a danger that, when a decision point comes, she will upset agreements carefully worked out by staff members. Thus, a collaborative venture ultimately depends on good communication and clarity about the delegation of authority *within* partner institutions.

*Fairness to grantees.* Collaborative grantmaking seeks to further the missions of both funders and their grantees. But potential grantees may feel at greater risk when the identification of worthy organiza-

tions depends on the collective decision of a number of funders, which increases the chances of an all-or-nothing outcome. While this danger cannot be entirely discounted, my experience has been that funders are protective of their autonomy, and that they tend to exercise independent judgment on basic issues such as the selection of grantees.

*Candor.* You will notice that I have not given any specific examples of the pathologies of collaboration. This is not due to their absence, but rather to a sense of how uncollegial it would be to name names. This suggests that collaboration may have some costs in terms of the restrictions it places on candor.

### *Concluding Observations*

Many of the Hewlett Foundation's collaborative ventures have produced net benefit. Even so, the transaction costs could often have been considerably lower than they were. Let me summarize the lessons we have learned about collaboration.

- Sometimes ego leads foundations to forego opportunities to join others in collaborating to build common value. The reluctance to consider projects “not invented here” is based on a fundamental misconception of how ideas develop. Even great thinkers like Leibniz, Newton, and Darwin drew on ideas that were in the air—part of the *zeitgeist*—and, in truth, most foundations' ideas fall well short of genius.
- Collaboration is enhanced by the participating institutions' flexibility with respect to due diligence, reporting, and evaluation procedures. It is also enhanced by the participants' abilities to communicate expeditiously and to make commitments. Collaboration is impeded to the extent that each institution insists on doing things its own way and that the participating program officers lack sufficient decisionmaking authority.
- Collaboration is enhanced to the extent that cognizant program staff approach the work with a problem-solving attitude and are able to subordinate turf-consciousness to the common venture.
- While collaboration thus requires mutual give-and-take, it must be consistent with the participating foundations' missions and should not result in grantmaking that falls short of their normal standards. It is hard to turn down a proposal when a colleague at

another foundation has worked hard on it. But politeness and collegiality should not supplant independent judgment.

- Successful collaborations require adaptive leadership and a shared understanding of the various participants' roles. Collaborations can take so many different forms that it is difficult to generalize. But, as in any collective enterprise, someone needs to play a coordinating function—not everyone can be a general, at least not at the same time. The participants will inevitably bring different strengths to the table. Collaboration is more likely to succeed to the extent that these are acknowledged and that individual and institutional egos do not get in the way.
- The internal cultures of the participating institutions can have dramatic effects on collaboration. The effects are asymmetric, with pathologies detracting more from the common venture than good internal practices contribute to it.
- Institutions considering entering into a collaborative enterprise should take a sober look at their plan early on to ensure that the potential benefits are likely to outweigh the costs.
- In the end, only one's experience with individuals and institutions can determine who is a good collaborator and who is not. As attractive as the potential impact may be, experience sometimes teaches that the game with some players is just too frustrating to be worth the candle.
- Finally, it should be noted that much joint funding takes place without any explicit collaboration, simply by virtue of foundations' independent core support for an organization. For example, together with many individual donors as well as other foundations, the Hewlett Foundation is a co-funder of performing arts organizations in the Bay Area. It is not the funders but the organizations themselves that bring everyone to the table. When it is feasible, the provision of general operating support is a highly efficient form of *virtual* collaboration that reduces the costs and potential pathologies described above.

PAUL BREST  
JUNE 2006

*Notes*

Full names of the foundations and other entities referred to in this essay:

The Andrew W. Mellon Foundation  
The Atlantic Philanthropies  
Bill & Melinda Gates Foundation  
Carnegie Corporation of New York  
Charles Stuart Mott Foundation  
The David and Lucile Packard Foundation  
Ford Foundation  
Gordon and Betty Moore Foundation  
The James Irvine Foundation  
The John D. and Catherine T. MacArthur Foundation  
The McKnight Foundation  
Mertz Gilmore Foundation  
Open Society Institute  
Richard & Rhoda Goldman Fund  
Rockefeller Brothers Fund  
Rockefeller Foundation  
The San Francisco Foundation  
Stuart Foundation  
TOSA Foundation  
Wallace Global Fund  
Wilburforce Foundation

<sup>1</sup> Many of the observations in this essay are based on the experience of the Hewlett Foundation's program directors and program officers. Any errors are the result of my not learning enough from them.

<sup>2</sup> The African Virtual University is itself the grantee of the Partnership for Higher Education in Africa discussed below.

<sup>3</sup> Egypt, Ghana, Kenya, Madagascar, Mozambique, Nigeria, South Africa, Tanzania, and Uganda.

<sup>4</sup> As these examples suggest, collaborative efforts may involve some inter-foundation fundraising. This is generally done with considerable restraint, both out of respect for peer institutions and the realization that high-pressure tactics are not likely to succeed.

<sup>5</sup> Indeed, collaboration offers an opportunity to give attention to developing common application, due diligence, and reporting processes so that a grantee is not subject to multiple and sometimes inconsistent requirements. To this end, the funders supporting the Energy Foundation require a single, thorough annual report. Many of the Hewlett Foundation's collaborative grants involving research on education finance and governance do the same, as does Connect US.

# *Programs*

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*THE PROGRAM STATEMENTS that follow describe certain specific objectives of The William and Flora Hewlett Foundation. Other goals are general; they underlie all the Programs and all the funding choices the Foundation makes.*

*FIRST, the Foundation has a strong basic commitment to the voluntary, nonprofit sector that lies between industry and government. Institutions and organizations in this category serve purposes very important to our society, and their health and effectiveness are a major concern. Accordingly, the Foundation intends to assist efforts to strengthen their financial base and increase their efficiency.*

*SECOND, the Foundation also believes that private philanthropy is of great value to society. Support from individuals, businesses, or foundations can supplement government funding and, in some important cases, can provide a benign and fruitful alternative. The Foundation considers the nation's habits of philanthropy, individual and corporate, less healthy than they could be, and therefore will be particularly receptive to proposals that show promise of stimulating private philanthropy.*

*A GREAT MANY excellent organizations meet both the general criteria suggested here and the specifications set forth in the statements that follow. Competition for the available funds is intense. The Foundation can respond favorably to only a small proportion of the worthwhile proposals it receives.*

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Grants in the Education Program promote long-term institutional and field development, reform, and knowledge creation. The Education Program supports policy studies, research, development, demonstrations, evaluations, dissemination, and public engagement to accomplish the following strategic priorities:

- Increasing student achievement by systematically improving instruction in urban school and community college classrooms.
- Using the Internet to increase access for all to high-quality open educational resources.
- Improving the quality and equality of California schools.
- Ensuring access to postsecondary education through California community colleges.
- Improving access to and the quality of K-12 education in Africa. The Education in Africa Initiative is in the planning stages and will be supported jointly by the Education, Global Development, and Population Programs.
- Supporting opportunity grants that are initiated by the Foundation and that complement the goals of the Education Program but do not fit into one of the other five categories. In particular, the Foundation may make selective grants that strive to ensure the quality of institutions of higher education.

**In 2005, the Education Program made grants totaling \$36,869,332.**

The Education Program has adopted several overarching strategies to increase the effectiveness of its grantmaking:

- Supporting field-building efforts, including forming networks of grantees and other experts
- Forming collaborations with other foundations and key private and public organizations
- Carrying out rigorous evaluation, research, and dissemination to assess the Program's progress and inform the next steps in its work

The Program continues to focus on complementary elements among its priority areas. The development of open educational resources, for example, contributes to the Program's work in the areas of instructional improvement, California community colleges,

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*Program  
Guidelines*

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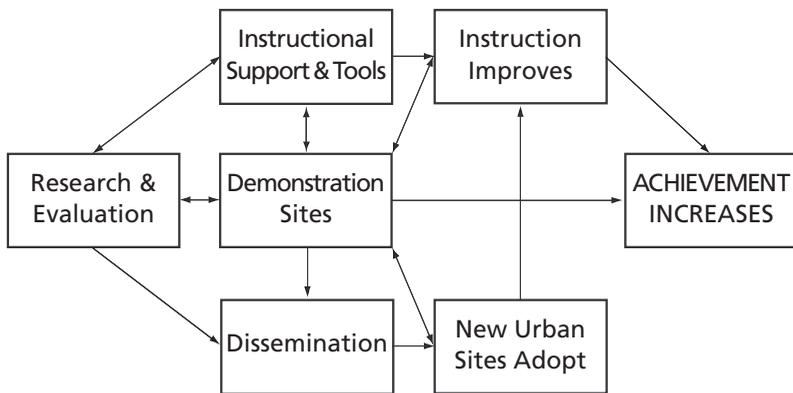
*Program  
Report*

and the Education in Africa Initiative. The shared problems, strategies, and goals of the California K-12 and California community college areas stand out as well. The Program also has common grants and overlapping strategies with the Population, Performing Arts, Global Development, Special Projects, and Regional Grants Programs.

*Improving Instruction in Urban K-12 Classrooms*

*Background.* At the heart of the Program’s approach to help improve student achievement in urban classrooms is the use of evidence-based methods—so-called “formative assessments”—for obtaining frequent feedback about student learning to guide instruction. Based on analysis of frequently gathered information, teachers identify the needs of students and then adjust their teaching methods to meet those needs. Gathering the data, analyzing it, and implementing a strategy to meet the needs of students constitute the elements of a cycle of improvement that can be repeated many times throughout a school year. The Program has developed two other priorities: One area overlaps with the open educational resources priority and focuses on the use of the Internet to provide high-quality information for teaching and learning for students and teachers of science, mathematics, and other areas. The second supports the Program’s work in California schools by addressing the need for research, development, and demonstration of effective practices for teaching students whose home language is not English.

*Improving Instruction*



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## 2005 Highlights

*Research and evaluation.* In 2005, the Program supported two research endeavors focused on understanding how to improve instruction. The first, the *Study of Instructional Improvement* at the University of Michigan, is the largest and most detailed study of its kind ever conducted for U.S. elementary schools. The second, the Strategic Education Research Partnership, is examining ways to improve literacy among low-achieving middle school students in Boston public schools.

*Demonstration sites.* The Program's investments in demonstration districts that focus on improving instruction have begun to bear fruit. Projects in the San Diego Unified School District and in East Palo Alto schools appear to have improved student performance substantially. The Program fulfilled its ten-year commitment to the Bay Area School Reform Collaborative in 2005, and expects reports on the final evaluation in 2006.

*Instructional support and tools development.* A few promising instructional tools and professional training models are emerging as a result of Program investments. For example, the Dana Center at the University of Texas has successfully field-tested its professional development program for math teachers. The Program also recently funded the development of several Web-based instructional tools designed to improve math and science instruction.

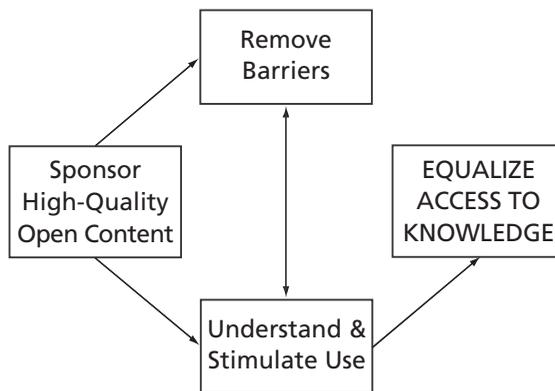
## 2006 Plans

The Program will continue to focus on strong research, demonstration models, and evaluation with an eye to ensuring high-quality implementation and long-term sustainability. The Program is reorganizing its 2006 activities around four thematic clusters of activities, which include exploring the possibility of establishing a center to coordinate and disseminate high-quality research on improving instruction; pursuing reforms that address specific needs in school districts; developing strategies to improve the achievement of English language learners; and creating tools to help teachers plan instruction, deliver content, and analyze student progress, particularly in math and science.

*Using the Web to Increase Access to High-Quality Open Educational Resources*

*Background.* Open educational resources (OER) consist of digitized educational content available on the Web for anyone, anywhere, to use and reuse for teaching, learning, and research. The Education Program has invested resources strategically to develop new ways of freely sharing OER across the globe. To reach the goal of equalizing access, the Program’s strategy has focused on creating exemplary models of academic content that are freely available, removing barriers to use of the content, and understanding and stimulating its use.

*Technology: Open Educational Resources*



**2005 Highlights**

*Sponsor high-quality open content.* The Program realized its 2005 goal of ensuring the successful launch of the OpenCourseWare Consortium. The Consortium, an international organization of more than fifty institutions committed to making course materials freely available for a worldwide audience, is thriving under the leadership of MIT OpenCourseWare.

*Remove barriers.* The Program has worked to remove barriers to the use of open content. To address the chaotic nature of the Web, the Program initiated the development of two searchable portals to help users locate open educational resources. The Development Gateway Foundation, a spinoff of the World Bank, launched a topic page on open educational resources for use in the developing world. A second portal, the Hewlett Foundation–supported Open Educational Resources Exchange, is expected to launch in 2006.

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*Understand and stimulate use.* The Program supported the development of a second regional distribution system to encourage institutions in developing nations to adopt or adapt available open content. This goal complements the Program's efforts in China and is being realized through the African Virtual University in Nairobi, an extensive network of African universities and learning centers.

### **2006 Plans**

In 2006, the Program will work with MIT OpenCourseWare and other Consortium members to recruit new institutions and seek other ways to extend the Consortium's reach and impact. New portal projects will be expanded and evaluated, and the Program will continue to search for means of converting existing exemplary course content into free online material. The Program will work closely with the African Virtual University to identify high-priority opportunities to support the creation, adaptation, and adoption of open content. More broadly, the Program will continue to work with partners in various sectors to ensure progress toward the goal of equalized access to OER around the world.

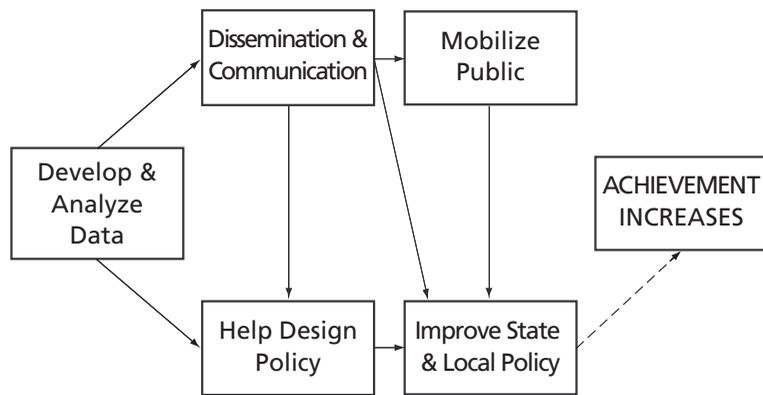
### *Improving the Quality and Equality of California Schools*

#### **K-12 Education Reform**

*Background.* The overarching goal for this work is to improve student achievement and graduation rates in California. The Program's grants focus on supporting and disseminating high-quality research on California's schools and students, state policy design and technical assistance for policymakers, and public information and engagement. The Program is working to develop more sophisticated communications mechanisms, provide timely technical assistance to policymakers, and build public sentiment and political will for serious reforms. Although California students' scores on state tests in mathematics and reading have improved, they still lag behind the rest of the nation in overall performance, and more than a quarter of California students do not complete high school. The Public Policy Institute of California estimates that by 2025 California will have two times more high school dropouts than the state can employ, and not enough college graduates to support a healthy economy. Our choice today is to increase the education level of our cit-

izens or be left behind in the highly competitive global marketplace of the future.

### California Schools: K-12



#### 2005 Highlights

*Implementing the Williams settlement effectively.* This historic class-action lawsuit, alleging that millions of low-income children in California were being denied the bare essentials for education, was settled in late 2004. In 2005, the Program made grants to provide public information and support community efforts to implement *Williams* statewide. Those investments are beginning to pay off. About 400 schools were identified for remedial action because of textbook deficiencies, and a similar number for facilities repairs; more than 1,100 teachers were reassigned to eliminate vacancies and to shift underqualified teachers to other assignments; and 85,000 students were moved from a foreshortened school calendar to a full 180 instruction days.

*Public reporting of local teacher salaries.* The legislature enacted a measure that requires individual schools to report publicly on teacher salaries. Previously, schools were required to report only the average teacher salary for the whole district. The new reporting requirements will make major inequities between schools clear, hopefully increasing support for school finance reform. Program grantees helped call for this transparency measure.

*Developing better finance and governance models.* In 2005, the Program worked to shift the public debate from the abstract ques-

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tion of equity to how much funding is needed to meet state standards for student achievement, and what governance systems can most effectively deliver those funds. With other foundations and at the behest of the legislature, Governor Schwarzenegger's Committee on Education Excellence, and the Department of Education, the Program is funding a series of studies to examine options for increasing the efficiency and transparency of the public school system and boosting state support.

*Increasing public awareness of state education policy issues.* Timely research funded by the Foundation is raising the sense of urgency about the state's education crisis. A January 2005 RAND report underscored the critical condition of California schools and caught the attention of policymakers, the media, and opinion leaders across the state. New data on the "hidden dropout crisis" revealed that students are actually faring much worse than the state had been reporting, and the Public Policy Institute of California's *California 2025: Taking on the Future* report focused attention on the long-term outlook for California.

### **2006 Plans**

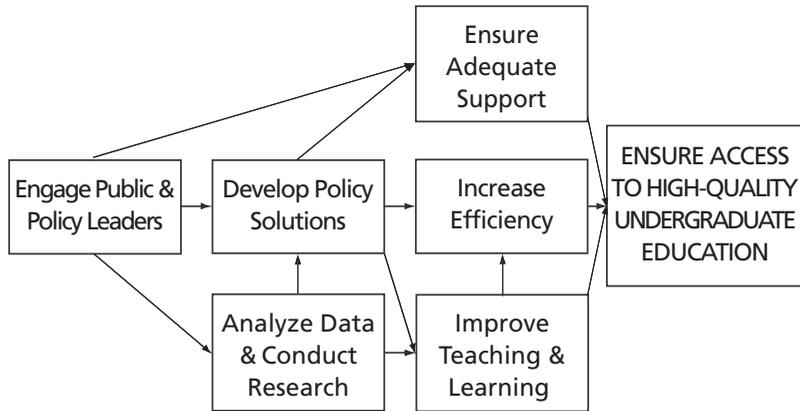
The Program's overarching goal for 2006 is to advance a number of specific policy reforms, including a new school finance system, improved governance structures, improved accountability measures, stronger systems for teacher recruitment and professional development, and new longitudinal data systems that track the progress of students, teachers, and schools. Because one barrier to policy reforms and greater investment in education is the short-term decisionmaking time frame of elected officials, the Program will commission new research to estimate the long-term value of education investments to the state. Finally, the Program will continue supporting successful community-based education reform efforts, explore work with faith-based organizations, help Latino groups develop a stronger voice on education policy, and help establish new groups focused on education in rapidly growing areas of the state, such as the Central Valley and Inland Empire.

### *Ensuring Access to Postsecondary Education Through California Community Colleges*

*Background.* "If California cannot maintain access and quality in

higher education, it will be a sad omen for the future of California (and the United States),” wrote former University of California President Clark Kerr, architect of the state’s Master Plan for Higher Education. Today, the vision of access and quality is more imperiled than ever. Because of the state’s growing population, California will require at least a half-million more seats in colleges and universities over the next decade, and access to higher education will depend heavily on California’s 109 community colleges. These public two-year colleges provide much of the state’s developmental education, job preparation, and adult education courses, as well as transfer opportunities for students seeking four-year degrees. But community colleges are underfunded, translating into low counselor-to-student ratios, lack of space in high-demand courses, and high rates of attrition.

### California Community Colleges



#### 2005 Highlights

*Promoting public awareness.* By successfully building a nonpartisan coalition of civil rights, labor, and business organizations, the Campaign for College Opportunity has helped focus the media and the policy community on the urgency of ensuring college opportunity, and has begun to be viewed as a model for other states. The Hewlett Foundation gave the Campaign its founding grant, and the investment helped it garner support from other funders.

*Improving instruction in community colleges.* The Program is investing in the Carnegie Foundation for the Advancement of Teaching’s

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ambitious project to improve developmental math and English instruction at community colleges. After an initial design phase, eleven colleges with promising instructional practices began demonstration and research phases this fall.

*Policy development.* The Program funded a project by California State University, Sacramento, to develop improved financing models for community colleges to better align the various funding components (state support, student fees, and financial aid) to improve access to higher education. In early November, a Hewlett Foundation–organized Symposium on Strengthening California’s Community Colleges brought together fifty individuals from grantee organizations, community colleges, state agencies, and other foundations.

### **2006 Plans**

The Program will support research on the use of data to learn about students who drop out of community colleges or who complete transfer programs but fail to transfer. By investing in this data analysis, the Program is seeking to create needed models for how the state’s data systems can be designed and used to enhance policy-making and academic research. The Program plans to invest in research into enhancing efficiency at community colleges as well as in research and advocacy initiatives aimed at increasing the college-going rate among underserved populations of the state. Finally, the Program will continue to build new alliances to further its goals.

### *Education in Africa Initiative*

*Background.* The strategic plans for the Education, Global Development, and Population Programs all propose deepening the Foundation’s commitment to the millennium goal of Education for All (EFA). In the last several years, the Programs have awarded a number of exploratory grants to support research and advocacy in this area. In September 2005, the Board of Directors approved a two-year exploration of the Foundation’s potential to have a longer-term impact in helping to meet the EFA goal, particularly in some of the most resource-poor countries in sub-Saharan Africa.

### *Opportunity*

*Background.* The opportunity grants category is intended to provide a place for grants that do not fit into the Program's priority areas.

#### **2005 Highlights**

In 2005, as in previous years, the opportunity component gave the Program the flexibility to fund important work outside of the major priority areas. The Program has continued working with the National Research Council on approaches to improving the quality of social and behavioral sciences research, and has also provided support for continuing the work started by the Engineering Schools of the West Initiative. Finally, in collaboration with Performing Arts, the Program invested in several arts education projects.

#### **2006 Plans**

The Program plans to continue the project on the quality of behavioral and social science and its use in developing evidence for policymaking. The Program also envisions a series of grants to explore the potential for achieving systemic reforms to substantially increase access to arts education for Bay Area and California students. A third area of focus will be an initiative with the Bush Foundation to help improve student retention at historically black private colleges and universities.

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<i>Achievement</i>	
<b>BAY AREA SCHOOL REFORM COLLABORATIVE</b> San Francisco, CA <i>For the Hewlett-Annenberg Challenge for school reform in the Bay Area</i>	\$2,333,333
<b>BOSTON PLAN FOR EXCELLENCE</b> Boston, MA <i>For support of the implementation of formative assessments for reading throughout the Boston public schools</i>	122,000
<b>COLD SPRING HARBOR LABORATORY</b> Cold Spring Harbor, NY <i>For support of a project to develop, evaluate, and disseminate Genes to Cognition (G2C) Online, an Internet site modeled on principles of neural networking that examines current research to discover the molecular and cellular basis of human thinking</i>	470,000
<b>HAYWARD UNIFIED SCHOOL DISTRICT</b> Hayward, CA <i>For the planning and design of a systemwide model for effective English language instruction in the Hayward Unified School District</i>	195,000
<b>MDRC</b> New York, NY <i>For an evaluation of the Bay Area School Reform Collaborative's impact on student achievement</i>	400,000
<b>NATIONAL SCIENCE TEACHERS ASSOCIATION</b> Arlington, VA <i>For support of the development of open online science learning objects for K-12 science teachers</i>	800,000
<b>NEW SCHOOLS CENTER OF SILICON VALLEY</b> San Jose, CA <i>For the development of a strategic plan and business plan (Collaboration with Philanthropy)</i>	
<b>SRI INTERNATIONAL</b> Menlo Park, CA <i>For the addition of a fifth school to the evaluation of the KIPP academies in the San Francisco Bay Area</i>	84,000
<b>STANFORD UNIVERSITY</b> Stanford, CA <i>For the advancement and dissemination of knowledge about effective mathematics teaching approaches</i>	35,000
<b>STRATEGIC EDUCATION RESEARCH PARTNERSHIP INSTITUTE</b> Washington, DC <i>For general support</i>	400,000
<b>UNIVERSITY OF CALIFORNIA AT SAN DIEGO</b> La Jolla, CA <i>For examining the longer-term effects of San Diego's Blueprint for Student Success by studying gains in individual students' test scores between 2001 and 2005</i>	100,000

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>UNIVERSITY OF CALIFORNIA AT SANTA CRUZ, NEW TEACHER CENTER</b> Santa Cruz, CA <i>For renewal of support for the New Teacher Center's work in the Ravenswood School District (Collaboration with Regional Grants)</i>	200,000
<b>UNIVERSITY OF COLORADO AT BOULDER</b> Boulder, CO <i>For developing interactive simulations and supporting materials for teaching physics and chemistry to be freely available online</i>	600,000
<b>UNIVERSITY OF IOWA, THE WIDERNET PROJECT</b> Iowa City, IA <i>For an organizational effectiveness grant for the WiderNet Project (Collaboration with Philanthropy)</i>	
<b>UNIVERSITY OF MICHIGAN, SCHOOL OF EDUCATION</b> Ann Arbor, MI <i>For continuing support of the Study of Instructional Improvement</i>	1,000,000
<b>UNIVERSITY OF PITTSBURGH, LEARNING RESEARCH AND DEVELOPMENT CENTER</b> Pittsburgh, PA <i>For developing a managed curriculum for secondary schools in the Los Angeles Unified School District and training teachers and instructional coaches for a pilot implementation</i>	600,000

## California Reform

<b>ACLU FOUNDATION OF SOUTHERN CALIFORNIA</b> Los Angeles, CA <i>For efforts to monitor and support implementation of the Williams settlement statewide</i>	250,000
<b>ADVANCEMENT PROJECT</b> Los Angeles, CA <i>For finishing Advancement Project's state-level advocacy work to ensure poor communities a fair share of funding from new school facility bonds</i>	125,000
<b>ARTS OF PEACE, THE MAINSTREAM MEDIA PROJECT</b> Arcata, CA <i>For efforts to gain radio access for education experts and nontraditional voices for education reform in California</i>	200,000
<b>CALIFORNIA BUDGET PROJECT</b> Sacramento, CA <i>For building substantial new capacity to analyze education finance and policy issues</i>	250,000
<b>CALIFORNIA OFFICE OF THE SECRETARY FOR EDUCATION</b> Sacramento, CA <i>For support of the Governor's Committee on Education Excellence</i>	200,000
<b>CALIFORNIA SCHOOL BOARDS ASSOCIATION</b> West Sacramento, CA <i>For community partners to plan and build a statewide coalition to promote needed reforms in K-12 public schools</i>	525,000

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>CALIFORNIA STATE UNIVERSITY AT SACRAMENTO FOUNDATION, INSTITUTE FOR HIGHER EDUCATION LEADERSHIP AND POLICY</b> Sacramento, CA <i>For development of a new finance model for California's community colleges</i>	275,000
<b>CALIFORNIANS FOR JUSTICE EDUCATION FUND</b> Oakland, CA <i>For an organizational effectiveness grant (Collaboration with Philanthropy)</i>	
<b>CAMPAIGN FOR COLLEGE OPPORTUNITY</b> Oakland, CA <i>For general support</i>	1,000,000
<b>CARNEGIE FOUNDATION FOR THE ADVANCEMENT OF TEACHING</b> Stanford, CA <i>For Strengthening Pre-collegiate Education in Community Colleges, a program to improve teaching and learning in developmental mathematics and English classes</i>	1,300,000
<b>CENTER FOR THE FUTURE OF TEACHING AND LEARNING</b> Santa Cruz, CA <i>For general support for work to strengthen the teacher workforce in California through research, communications, and outreach activities</i>	1,500,000
<b>COMMITTEE FOR ECONOMIC DEVELOPMENT</b> Washington, DC <i>For an effort to educate and mobilize the business community on the need for school finance reform in California</i>	150,000
<b>EDSOURCE</b> Mountain View, CA <i>For general support</i>	1,200,000
<b>EDUCATION TRUST – WEST</b> Washington, DC <i>For an organizational effectiveness grant (Collaboration with Philanthropy)</i>	
<b>EDUCATION WRITERS ASSOCIATION</b> Washington, DC <i>For training for journalists from California and nationwide on education data and statistics</i>	80,000
<b>FURMAN UNIVERSITY, RICHARD W. RILEY INSTITUTE</b> Greenville, SC <i>For research, knowledge dissemination, and policy development focusing on the implementation of a school finance court decision brought on behalf of students in eight poor rural communities in South Carolina</i>	600,000
<b>GROSSMONT-CUYAMACA COMMUNITY COLLEGE DISTRICT AUXILIARY</b> El Cajon, CA <i>For a strategic development phase to review the growth of the California Partnership for Achieving Student Success, refine its strategic goals and relationships to other institutions and projects, and build on knowledge from the evaluation under way</i>	100,000
<b>LATINO ISSUES FORUM</b> San Francisco, CA <i>For work with Latino school board members throughout California to develop and advance a Latino education policy agenda at the state level</i>	100,000

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>MPR ASSOCIATES</b> Berkeley, CA <i>For a preliminary analysis of California community college data for the purposes of planning for and analysis of data from longitudinal studies</i>	25,000
<b>PACIFIC NEWS SERVICE/NEW CALIFORNIA MEDIA</b> San Francisco, CA <i>For building the capacity of ethnic media in California to cover state education policy issues</i>	215,000
<b>PICO NATIONAL NETWORK</b> Oakland, CA <i>For a national training institute for community organizing groups working on education issues and for a follow-up institute in California</i>	70,000
<b>POLICYLINK</b> Oakland, CA <i>For the planning process for a long-term statewide effort to promote fiscal and governance reform in California (Collaboration with Special Projects)</i>	30,000
<b>PUBLIC ADVOCATES</b> San Francisco, CA <i>For efforts to monitor and support implementation of the Williams settlement, including work with county superintendents and grassroots community organizations</i>	600,000
<b>PUBLIC POLICY INSTITUTE OF CALIFORNIA</b> San Francisco, CA <i>For a survey series dedicated to gauging public attitudes on the state's education system, environmental condition, and rapid population growth (Collaboration with Environment and Population)</i>	225,000
<b>RAND CORPORATION</b> Santa Monica, CA <i>For economic projections of the returns to California taxpayers over time from increased investments in education today</i>	190,000
<b>RESOURCE AREA FOR TEACHERS</b> San Jose, CA <i>For general support (Collaboration with Regional Grants)</i>	
<b>RESOURCES LEGACY FUND</b> Sacramento, CA <i>For a planning grant for a statewide effort to promote fiscal reform in California (Collaboration with Special Projects)</i>	30,000
<b>SAN FRANCISCO FOUNDATION</b> San Francisco, CA <i>For providing support to grassroots organizations in California focusing on activities to increase transparency about the state budget and to mobilize for reform (Collaboration with Special Projects)</i>	100,000
<b>STANFORD UNIVERSITY, SCHOOL OF EDUCATION</b> Stanford, CA <i>For coordination of research on school finance and the effective use of resources in California public schools</i>	600,000

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>STRATEGIC CONCEPTS IN ORGANIZING AND POLICY EDUCATION</b> Los Angeles, CA <i>For leading a strategic planning process to strengthen the Campaign for Quality Education</i>	75,000
<b>UNIVERSITY OF CALIFORNIA AT BERKELEY, POLICY ANALYSIS FOR CALIFORNIA EDUCATION</b> Berkeley, CA <i>For general support of Policy Analysis for California Education</i>	1,500,000
<b>UNIVERSITY OF CALIFORNIA AT LOS ANGELES, INSTITUTE FOR DEMOCRACY, EDUCATION AND ACCESS</b> Los Angeles, CA <i>For support for the Just Schools California program</i>	975,000
<b>UNIVERSITY OF SAN DIEGO, COMMUNITY COLLEGE LEADERSHIP DEVELOPMENT INITIATIVE</b> San Diego, CA <i>For the Community College Leadership Development Initiative, to train current and future leaders for California's community colleges (Collaboration with Philanthropy)</i>	150,000
<b>UNIVERSITY OF SOUTHERN CALIFORNIA</b> Los Angeles, CA <i>For a series of impartial, nonpartisan analyses of four ballot initiatives facing California voters in the November 2005 special election (Collaboration with Special Projects and Population)</i>	70,000
<b>WORKING PARTNERSHIPS USA</b> San Jose, CA <i>For the California Values Project (Collaboration with Special Projects)</i>	125,000
<b>Opportunity</b>	
<b>CALIFORNIA COUNTY SUPERINTENDENTS EDUCATIONAL SERVICES ASSOCIATION</b> Sacramento, CA <i>For the Reinvigorating Arts Education in California project (Collaboration with Performing Arts)</i>	175,000
<b>EDITORIAL PROJECTS IN EDUCATION, EDUCATION WEEK</b> Bethesda, MD <i>For general operating support</i>	100,000
<b>EDUCATION SECTOR</b> Chevy Chase, MD <i>For general support</i>	1,350,000
<b>GREATSCHOOLS</b> San Francisco, CA <i>For general support, with the goal of the organization becoming self-sustaining after the grant</i>	580,000
<b>INSTITUTE FOR COLLEGE ACCESS AND SUCCESS</b> Berkeley, CA <i>For general support</i>	300,000

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>JULIA MORGAN CENTER FOR THE ARTS</b> Berkeley, CA <i>For general support of the Lincoln Center Institute program (Collaboration with Performing Arts)</i>	150,000
<b>LEARNING MATTERS</b> New York, NY <i>For support of the production of eighteen to twenty PBS (mostly Nightly NewsHour) reports on various education subjects</i>	450,000
<b>NATIONAL CENTER ON EDUCATION AND THE ECONOMY</b> Washington, DC <i>For a research and policy analysis project to explore ways to raise the productivity of education and training institutions in the United States</i>	400,000
<b>NEW SCHOOLS VENTURE FUND</b> San Francisco, CA <i>For support for the creation of Education Sector, an independent, nonpartisan education policy center based in Washington, DC</i>	175,000
<b>SOUTHERN EDUCATION FOUNDATION</b> Atlanta, GA <i>For the Education Amendment Working Group (Collaboration with Special Projects)</i>	
<b>SRI INTERNATIONAL</b> Menlo Park, CA <i>For a study of arts education in California (Collaboration with Performing Arts and Regional Grants)</i>	150,000
<b>UNIVERSITY OF CALIFORNIA AT MERCED</b> Merced, CA <i>For improving outreach and support services to disadvantaged transfer students of the Central Valley to attend UC Merced (Collaboration with Regional Grants)</i>	
<b>Technology</b>	
<b>AFRICAN VIRTUAL UNIVERSITY</b> Nairobi, Kenya <i>For a project to analyze and help improve the capacity of seventeen African universities to develop or re-author academic content for use in the AVU's open distance and e-learning initiative</i>	50,000
<i>For a program entitled "Bandwidth Consolidation for Partnership Universities" sponsored by the Partnership for Higher Education in Africa (Collaboration with Special Projects, Population, and Global Development)</i>	100,000
<b>AFRICAN VIRTUAL UNIVERSITY, TEACHER EDUCATION IN SUB-SAHARAN AFRICA (TESSA)</b> Nairobi, Kenya <i>For general support of the Teacher Education in Sub-Saharan Africa Program</i>	900,000
<b>CREATIVE COMMONS</b> San Francisco, CA <i>For general support</i>	1,300,000

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>DEVELOPMENT GATEWAY FOUNDATION</b> Washington, DC <i>For developing a topic page on Open Educational Resources (OER) for the Web-based portal (<a href="http://www.developmentgateway.org">www.developmentgateway.org</a>)</i>	235,000
<b>FOOTHILL-DE ANZA COMMUNITY COLLEGE DISTRICT</b> Los Altos Hills, CA <i>For implementation of the SAKAI open source software across California community colleges, and for contribution to the development and enhancement of tools to support online learning</i>	400,000
<b>FORUM FOR THE FUTURE OF HIGHER EDUCATION</b> Cambridge, MA <i>For the development and implementation of a forum on human cognition and new technologies</i>	190,000
<b>IET FOUNDATION</b> Golden, CO <i>For selection, translation, adoption, and use of OpenCourseWare materials from MIT and other OCW institutions by Chinese universities, and for translation of original course materials from Chinese universities for use globally to enhance education</i> <i>For Chinese Open Resources for Education (CORE) to continue making OpenCourseWare available throughout China</i>	800,000 200,000
<b>INSTITUTE FOR THE STUDY OF KNOWLEDGE MANAGEMENT IN EDUCATION</b> Half Moon Bay, CA <i>For research and analysis to help stimulate innovations in the online learning of developmental courses in community colleges</i> <i>For building a Web site to increase awareness and understanding about open educational resources to help users find materials that meet their needs, and to provide tools for gathering user evaluations of the materials</i>	190,000 200,000
<b>JOHNS HOPKINS UNIVERSITY</b> Baltimore, MD <i>For support of Johns Hopkins Bloomberg School of Public Health OpenCourseWare</i>	634,000
<b>MASSACHUSETTS INSTITUTE OF TECHNOLOGY</b> Cambridge, MA <i>For continued support of MIT OpenCourseWare—a free, open Web site offering high-quality MIT teaching materials to educators, students and self-learners worldwide</i>	3,000,000
<b>NEW AMERICA FOUNDATION</b> Washington, DC <i>For accelerating the constructive dialogue between commercial and noncommercial stakeholders active in the digitization and publication, broadly defined, of educational and cultural heritage materials</i>	187,000
<b>OPEN UNIVERSITY</b> Milton Keynes, United Kingdom <i>For the preparatory phase of the UK Open University's Open Content Initiative that will make its existing exemplary curriculum resources, wrapped with powerful tools to support learning, freely available on the Web</i>	200,000

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT</b>	
Paris, France	
<i>For an international study of demand- and supply-side issues related to Open Educational Resources</i>	270,000
<i>For an international forum on e-learning</i>	25,000
<b>REUTERS FOUNDATION</b>	
London, United Kingdom	
<i>For support of a meeting to help develop and provide a high-quality Knowledge Management System for the Global ICT Education Program (NetGrowth)</i>	18,000
<b>STANFORD UNIVERSITY CENTER FOR THE STUDY OF LANGUAGE AND INFORMATION</b>	
Stanford, CA	
<i>For support of a strategy to reach financial sustainability for the online, open Stanford Encyclopedia of Philosophy</i>	190,000
<b>STANFORD UNIVERSITY, GREEN LIBRARY</b>	
Stanford, CA	
<i>For a feasibility study on developing automated tools for determining the copyright status of works published in the United States between 1923 and 1964</i>	125,000
<i>For organizing a working group to plan for large-scale digitization of Arabic-language books</i>	53,000
<b>TUFTS UNIVERSITY, SCHOOL OF MEDICINE</b>	
Medford, MA	
<i>For Phase I of the University's Graduate School of Health, Science, and International Affairs OpenCourseWare project</i>	200,000
<b>UNITED NATIONS EDUCATIONAL, SCIENTIFIC AND CULTURAL ORGANIZATION, INSTITUTE FOR EDUCATIONAL PLANNING</b>	
Paris, France	
<i>For support of an international community of practice on Open Educational Resources</i>	166,000
<b>UNIVERSITY OF CALIFORNIA AT IRVINE, UNIVERSITY EXTENSION</b>	
Irvine, CA	
<i>For the development of open courses and support materials to prepare teachers in the state of California for a teaching credential in mathematics</i>	200,000
<b>UNIVERSITY OF IOWA, THE WIDERNET PROJECT</b>	
Iowa City, IA	
<i>For general support of the WiderNet program</i>	226,000
<b>UNIVERSITY OF MAURITIUS</b>	
Réduit, South Africa	
<i>For support of the 2005 edition of the Second International Conference on Open and Online Learning (ICOOL) in South Africa</i>	25,000
<b>UNIVERSITY OF MICHIGAN</b>	
Ann Arbor, MI	
<i>For the University of Michigan and Foothill College to prototype a conversion process that links SAKAI and OpenCourseWare/eduCommons to rapidly and cost-efficiently generate open educational content</i>	185,000

<b>Education: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>UNIVERSITY OF NOTRE DAME</b> Notre Dame, IN <i>For the University of Notre Dame OpenCourseWare project to support the development of thirty courses in the fields of philosophy, theology, anthropology, ethics, and peace and international studies</i>	233,000
<b>UTAH STATE UNIVERSITY, CENTER FOR OPEN AND SUSTAINABLE LEARNING</b> Logan, UT <i>For support for eduCommons, Open Learning Support, and Utah State University OpenCourseWare</i>	1,500,000
<b>WESTERN INTERSTATE COMMISSION FOR HIGHER EDUCATION</b> Boulder, CO <i>For development of a business plan and strategy to ensure the sustainability of EduTools and for support of the WCET director to serve as an ambassador for Open Educational Resources at various meetings throughout the world</i>	213,000
<b>YALE UNIVERSITY</b> New Haven, CT <i>For making published scientific research on the environment available to public and nongovernmental organizations in developing countries</i>	250,000
 <i>Universal Basic &amp; Secondary Education (UBASE)</i>  	
<b>AFRICAN POPULATION AND HEALTH RESEARCH CENTRE</b> Nairobi, Kenya <i>For general operating support (Collaboration with Population)</i>	50,000
<b>COUNCIL ON FOREIGN RELATIONS</b> Washington, DC <i>For general support of the Council on Foreign Relations' Center for Universal Education (Collaboration with Population and Global Development)</i>	250,000
<b>GLOBAL CAMPAIGN FOR EDUCATION</b> Brussels, Belgium <i>For general support (Collaboration with Population and Global Development)</i>	75,000
<b>STANFORD UNIVERSITY, SCHOOL OF EDUCATION</b> Stanford, CA <i>For a planning grant to create a global education research and policy network</i>	25,000

# Environment

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## Program Guidelines

The Environment Program at the Hewlett Foundation is working to respond to some of the most significant environmental challenges of our time. The program has three broad goals: to protect the great landscapes of the North American West, to build stronger, more diverse constituencies for environmental protection in California, and to reduce the environmental impacts of fossil fuel energy systems by promoting energy efficiency and renewable energy.

**In 2005, the Environment Program made grants totaling \$38,921,403 (plus a \$250,005 Program-related investment).**

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## Program Report

### *The West*

The Program's western work has six principal elements. Four are clear environmental goals, and two are important steps in reaching those goals. The goals are:

- Protect open spaces and wilderness
- Ensure adequate natural flows of water—specifically, by protecting free-flowing streams and the plants and animals they support
- Reduce the destruction from fossil fuel development
- Support public finance for open space

In order to improve the chances of reaching these goals, the Foundation has also made major commitments to strengthen two important areas of the environmental field:

- Making conservation organizations more effective
- Developing new constituencies for the environment in California, especially in Los Angeles and in the Central Valley, and in the state's fastest-growing, diverse populations

*Wilderness.* In 2005, the Program moved closer to its goals for the conservation of Canada's Great Bear Rainforest as well as protecting that country's boreal forests. The Hewlett Foundation, along with the Rockefeller Brothers Fund and the Packard, Moore, and Wilburforce Foundations, has been part of a public-private partnership supporting a coalition of groups working with the Canadian government, industry, and residents to provide both environmental protection and new economic opportunities in the region. In early 2006, the government of British Columbia endorsed new land

use management plans that designated five million acres of the Great Bear Rainforest for wilderness protection, and that would limit logging and other development on an additional fifteen million acres. Although the announcement is a key step toward the permanent protection of the Great Bear Rainforest, the final deal is not yet complete. Foundation staff are still in discussions with the government of British Columbia and Canada on financial, legislative, and governance agreements. We are optimistic that these details will be resolved over the next year.

The Program also has a significant commitment to protect the Canadian boreal forest—the vast swath of intact forest that spans the entire continent. The Foundation’s principal partners in this effort are the Pew Charitable Trusts and the Canadian Boreal Initiative.

If these two efforts are successful, the Hewlett Foundation will have played an important role in two of the largest land preservation deals in history.

*Water.* In early 2005, the Program commissioned an evaluation of its grants involving western waters. The results are encouraging. The Program’s two strategies—working within the Federal Energy Regulatory Commission dam relicensing process to get significant natural flows returned to streams and reforming water law in headwaters states—are both delivering significant returns. The Program has large commitments to the Hydropower Reform Coalition for the dam relicensing work and to Trout Unlimited for the headwaters legal reform.

*Fossil fuels.* Seeing the effect of recent fossil fuel extraction on the West is heartrending. The energy boom in the West is chasing far more dispersed energy deposits than previous booms, with commensurably higher environmental destruction. The most pernicious examples are coalbed methane and tar-sands oil. Coalbed methane is a low-grade energy source, and each well requires a road, a drilling pad, a pond for mined water, a compressor, and



Courtesy of The Nature Conservancy

### Facts About Canada’s Boreal Forests

- *Home to 25% of the world’s remaining frontier forests*
- *Crucial breeding habitat for more than 30% of North America’s bird population*
- *Home to more than 600 First Nations communities*
- *Canada’s largest ecosystem, covering 58% of the country*

a pipeline. Most wells pour a huge amount of saline water onto the land nearby, rendering it infertile.

The successes of Program grantees working in the fossil fuels realm include:

- Some forty conservation groups joined to form the Rocky Mountain Energy Campaign, which provides media training, produces communications materials, supports common research, and helps map out strategies.
- The Rocky Mountain Energy Campaign has developed important partnerships with ranchers, hunters and anglers, Native American groups, and private property owners in building a more diverse coalition in support of sustainable oil and gas development.
- Program grantees worked with the Western Governors' Association to develop an Association-endorsed coalbed methane best-practices manual.
- Program grantees have documented coalbed methane's excessive and wasteful use of water and its serious consequences for air quality, and they have developed new regulatory proposals to encourage more sustainable development practices.

The Environment Program and its grantees do not argue that there should be no development, but rather that some places are too special to develop, that any development should use the best economically feasible technology and reclamation, and that states and the federal government should aggressively promote energy efficiency, conservation measures, and the expansion of renewable resources.

*Public finance for open space.* The American public wants protected open space and is willing to pay for it. This has been proven in dozens of referenda across the West, generating billions of dollars for conservation easements, parks, and other direct conservation programs. The Program has funded research and public education that helps groups decide what kinds of initiatives might make sense for their regions.

*Making conservation organizations more effective.* The Hewlett Foundation is one of the largest funders of environmental protection in the West, and the Environment Program has an obligation to consider the health and futures of the groups it funds and to help

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them achieve their goals. The Program supports an extraordinary group of dedicated people, some of whom have found very effective ways to protect the West's land, air, and water. However, many environmental groups are less effective than is needed, and their persuasive power is waning.

To meet this challenge, these organizations must creatively expand their approach and style to connect to the public, specific constituencies, and decisionmakers. The Program has held retreats for the leaders of the western environmental movement, participated in hundreds of discussions, and met with academic leaders, policymakers, opinion leaders, and other foundation leaders, to develop a plan to strengthen the environmental movement in the West.

*New constituencies for the environment.* The demographics of California and much of the West are changing rapidly. California has become a minority-majority state, and it is experiencing rapid growth in the Central Valley and greater Los Angeles, including the Inland Empire region. The growing ethnic communities in these areas, which bear a disproportionate burden of pollution, need a strong cadre of environmental leaders to represent them. Increased collaboration on statewide policy goals is particularly important.

The Program's New Constituencies for the Environment initiative seeks to cultivate tomorrow's environmental leadership. The Program is working to improve air quality, parks, and open space in the Central Valley and Los Angeles. Building on an anchor organization, the Coalition for Clean Air, it is helping create networks of organizations working toward these common goals.

### *Energy*

The energy component of the Environment Program has three principal elements:

- **Transforming Cars and Trucks: Sustainable Mobility** – The Foundation supports efforts in the United States, Canada, China, México, and Brazil to encourage more efficient, lower-polluting cars and trucks. In México, Brazil, and China, we are also supporting efforts to build bus rapid transit (BRT) systems. The U.S.- and China-related work is conducted through the Energy Foundation.

- **National Energy Policy** – The Foundation supports efforts to bolster scientific and political support for a new, visionary U.S. energy policy. Much of this effort is pursued through our sponsorship of the National Commission on Energy Policy and through grantmaking by the Energy Foundation.
- **Western Energy Policy** – The Foundation supports efforts to build a clean energy plan for the West, aimed at promoting renewable energy and utility energy efficiency programs and at reducing unnecessary conventional power plant development.

*Transportation.* The energy portfolio is delivering steady, large-scale returns. In Mexico City, the Insurgentes BRT corridor recently opened along a twenty-kilometer north-south axis. Program grantees and consultants are in discussions with Mexico City about another major corridor, as well as with the state of México and another half-dozen Mexican cities about their interests. Program grantees are also working to modernize Mexican environmental regulations so that México adopts U.S. fuel and tailpipe standards for automobiles, a move that would cut emissions from new vehicles by more than 95 percent compared to the average for vehicles sold today.

Work in Brazil is going more slowly, but most cognizant Brazilian agencies have now agreed in principle on the need for cleaner fuels, and the Brazilian Minister of the Environment has agreed to launch the process that will result in a phase-in of tailpipe standards. Program grantees have designed two new BRT corridors and are hoping that at least one will be approved in 2006.

The Foundation's grantees' success in China is significant, with a dozen cities seeking design assistance from the new Bus Rapid Transit Center. A BRT line in Beijing is open and being expanded. Workshops sponsored by the Energy Foundation on fiscal policies for clean transportation should lead to an announcement that China will tax larger, inefficient vehicles substantially more than smaller, efficient ones, and we are hopeful that China will soon adopt fuel quality and tailpipe standards on a par with those in the United States or Europe.

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Finally, in Canada, the government adopted a target of 5.4 million metric tons of carbon reduction for its auto fleet. Program grantees played an important role in this achievement.

*Energy in the West.* In addition to the western agenda described above, the Program also works to promote energy efficiency and renewable energy in the American West. Grants managed by the Energy Foundation, together with those made directly, have resulted in regulatory policies with tremendous savings in energy and costs to consumers. For example, Arizona adopted new appliance standards that will save consumers \$640 million over the next fifteen years. Program grantees in the western states are expert in their venues—typically public utilities commissions. They have access to first-rate analysis, and they are producing large-scale energy efficiency and renewable energy victories.

*National energy policy.* The largest Hewlett Foundation commitment to national energy policy in 2005 was for the rollout of the report by the National Commission on Energy Policy. Dozens of the Commission's recommendations were incorporated in the U.S. Energy Bill, including hundreds of millions of dollars for renewable and other clean energy technologies. Although the two most important elements—a mandatory, economy-wide cap-and-trade system for greenhouse gases and a strategy to reduce fuel waste in vehicles—were knocked out, progress was made on both fronts: In the most significant federal political development on climate change to date, a Sense of the Senate Resolution calling for a mandatory carbon program passed with fifty-three votes.

In addition to continuing to support the Commission in 2006, the Program will continue to fund research to develop clean energy, including advanced coal with carbon capture and sequestration, large-scale renewable energy, and biomass.

*Climate change.* The Program has been exploring ways to get the largest developing nations into a climate regime for reducing greenhouse gas emissions. The substance of this strategy was developed in a two-day retreat of senior scientists and government officials from Brazil, India, China, and México, the four largest developing country emitters of greenhouse gases.

Environment Program: 2005 Progress

	México	Brazil	China	US	California	Canada
Set fuel efficiency standards						*
Clean up fuels		*				
Set stringent tailpipe standards		*				
Retrofit most-polluting vehicles						
Bus Rapid Transit (BRT)			*	N/A	N/A	N/A
Deploy hybrid vehicles						

*The lightest shade denotes strong progress; the medium shade indicates room for optimism; the darkest shade represents no progress yet. An asterisk marks an important victory in 2005.*

**2006 Evaluation Plans**

In 2006, the Program plans to evaluate its BRT grants in México, Brazil, and China, which include commitments totaling some \$3 million per year, split among the three nations. The work has been successful, but some major questions remain, including how to expand from single to multiple bus lines in any given city, how to meet the demand for design assistance, and how to ensure quality control.

Second, the Program will evaluate its wilderness work in the United States. Program grantees are pursuing several opportunities to protect wilderness in the United States, but there are challenges. New wilderness bills have required concessions, some of which are not ecologically ideal; at the same time, the federal government has handed over to the states the planning function for 48 million acres of roadless areas, which creates both perils and opportunities. The Program will assess the capacities of organizations in this area and work with them to build more effective strategies.

## *Energy*

**ASSOCIAÇÃO O ECO**

Rio de Janeiro, Brazil

*For general support of the São Paulo office, which is dedicated to reporting on urban air pollution issues*

\$150,000

**CALSTART**

Pasadena, CA

*For the California Transportation Energy Security Initiative  
(Collaboration with Special Projects)*

250,000

*For general support of the Hybrid Truck Users Forums program*

300,000

**CENTER FOR CLEAN AIR POLICY**

Washington, DC

*For work with expert teams in China, India, and Brazil to develop comprehensive analyses of greenhouse gas reduction strategies*

100,000

**CENTRO DE INVESTIGACIÓN CIENTÍFICA DE YUCATÁN**

Mérida, México

*For the Intergovernmental Panel on Climate Change's (IPCC) third meeting of Working Group II for the Fourth Assessment Report*

20,000

**CENTRO MEXICANO DE DERECHO AMBIENTAL**

Mexico City, México

*For development of a long-term communications plan*

30,000

**CLEAN AIR TASK FORCE**

Boston, MA

*For completion of a project in Bangkok, Thailand, to develop a model for cleaning up diesel air pollution throughout the developing world*

25,000

*For a collaborative project with the Goddard Institute of Space Studies for efforts to limit global climate change*

200,000

**COLUMBIA UNIVERSITY**

New York, NY

*For additional travel costs associated with a collaboration to develop a better understanding of exactly how important black carbon is as a greenhouse agent and conduct a preliminary black carbon inventory*

50,000

**COLUMBIA UNIVERSITY, GODDARD INSTITUTE OF SPACE STUDIES**

New York, NY

*For a collaborative project with the Clean Air Task Force for efforts to limit global climate change*

200,000

**ELETRA HYBRID SYSTEMS**

Bloomfield Hills, MI

*For improvements to the Eletra hybrid bus design and control system*

200,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>ENERGY FOUNDATION</b>	
San Francisco, CA	
<i>For general support</i>	2,000,000
<i>For general support of the Energy Foundation's China Transportation program</i>	2,000,000
<i>For general support of the Energy Foundation's promotion of advanced technology vehicles in the United States</i>	1,500,000
<i>For general support of the Energy Foundation's promotion of clean energy policies in the United States</i>	1,500,000
<i>For support of the China Sustainable Energy Program</i>	1,000,000
<b>ENVIRONMENTAL DEFENSE</b>	
Oakland, CA	
<i>For a project with the Chinese State Environmental Protection Administration to improve the effectiveness and capacity of environmental enforcement in China</i>	200,000
<i>For a public education campaign about the benefits of increasing and extending the target date of the Texas Renewable Portfolio Standard to increase renewable energy in Texas</i>	300,000
<i>For a campaign to improve energy efficiency and reduce greenhouse gas emissions in car and truck fleets</i>	400,000
<i>For a report on the potential economic costs and benefits of climate change policy in California</i>	75,000
<b>FUNDACIÓN POR EL PAÍS QUE QUEREMOS</b>	
Bogotá, Colombia	
<i>For general support</i>	100,000
<b>GAIA FOUNDATION FOR EARTH EDUCATION</b>	
Drayton Valley, Canada	
<i>For general support of the Pembina Institute's Kyoto Protocol in Canada implementation program</i>	360,000
<b>GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION</b>	
Arlington, VA	
<i>For the Center for Energy and Climate Solutions</i>	100,000
<b>GOVERNORS' ETHANOL COALITION</b>	
Lincoln, NE	
<i>For implementation of the Ethanol from Biomass governors' recommendations</i>	275,000
<b>HEALTH EFFECTS INSTITUTE</b>	
Boston, MA	
<i>For the Science to Inform Transportation and Air Quality Decisions initiative</i>	500,000
<b>HYPERCAR</b>	
Glenwood Springs, CO	
<i>For development and production of low-cost advanced carbon composite structures for the auto industry</i>	250,000
<b>INSTITUTE FOR AMERICA'S FUTURE</b>	
Washington, DC	
<i>For general support of the Apollo Project for Good Jobs and Energy Independence</i>	300,000
<b>INSTITUTE FOR TRANSPORTATION AND DEVELOPMENT POLICY</b>	
New York, NY	
<i>For general support of sustainable transportation programs in Mexico City, São Paulo, and Guangzhou</i>	625,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>INSTITUTES FOR JOURNALISM AND NATURAL RESOURCES</b> Missoula, MT <i>For general support</i>	200,000
<b>INSTITUTO NACIONAL DE EFICIÊNCIA ENERGÉTICA</b> Rio de Janeiro, Brazil <i>For the Third Annual Brazilian Electric Vehicle Seminar and Exhibit</i>	20,000
<b>INTERACADEMY COUNCIL</b> Amsterdam, The Netherlands <i>For the Transitions to Sustainable Energy Systems study</i>	500,000
<b>INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION</b> Washington, DC <i>For general support</i>	2,400,000
<b>INTERNATIONAL ENERGY INITIATIVE</b> São Paulo, Brazil <i>For the publication of the scientific journal Energy for Sustainable Development</i>	180,000
<b>INTERNATIONAL SUSTAINABLE SYSTEMS RESEARCH CENTER</b> Diamond Bar, CA <i>For a joint project with Instituto Nacional de Ecologia to improve knowledge concerning motor vehicle emissions in Mexico City</i>	280,000
<b>LAWRENCE BERKELEY NATIONAL LAB</b> Berkeley, CA <i>For studies examining how safety and fuel economy can be simultaneously improved in the U.S. auto fleet</i>	200,000
<b>MARIO MOLINA CENTER FOR STRATEGIC STUDIES OF ENERGY AND THE ENVIRONMENT</b> Mexico City, México <i>For general support</i>	720,000
<b>MOVIMENTO ENGENHARIA</b> São Paulo, Brazil <i>For a course on urban mobility, environment, and sustainability, to be attended by senior transport planners in Brazil</i> <i>For support of six technical courses in São Paulo on worldwide innovations in public transportation</i>	12,000 82,000
<b>NATIONAL COMMISSION ON ENERGY POLICY</b> Washington, DC <i>For general support</i>	2,000,000
<b>NATIONAL RELIGIOUS PARTNERSHIP FOR THE ENVIRONMENT</b> Amherst, MA <i>For general support of the National Religious Partnership for the Environment's Climate and Energy Program</i>	400,000
<b>NATIONAL WILDLIFE FEDERATION</b> Washington, DC <i>For general support for the Campaign to Confront Global Warming project</i>	200,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>NATURAL RESOURCES DEFENSE COUNCIL</b> San Francisco, CA <i>For legal defense of California's clean car standards and related initiatives</i>	300,000
<i>For educating policymakers, the media, and opinion leaders on the impacts of oil prices, auto technology trends, and auto sector profits and jobs</i>	125,000
<b>NEW SCHOOL UNIVERSITY, GRADUATE FACULTY OF POLITICAL &amp; SOCIAL SCIENCE</b> New York, NY <i>For a conference focusing on issues with the environment, health, and energy (Collaboration with Special Projects and Population)</i>	25,000
<b>POLLUTION PROBE</b> Toronto, Canada <i>For general support of the Motor Vehicle Fuel Efficiency program</i>	90,000
<b>PRESENCIA CIUDADANA MEXICANA</b> Mexico City, México <i>For work on public transportation policy</i>	260,000
<b>PRINCETON UNIVERSITY, PRINCETON ENVIRONMENTAL INSTITUTE</b> Princeton, NJ <i>For general program support of Princeton University's Energy Systems/ Policy Analysis group</i>	400,000
<b>PUBLIC POLICY INSTITUTE OF CALIFORNIA</b> San Francisco, CA <i>For a survey series dedicated to gauging public attitudes on the state's education system, environmental condition, and rapid population growth (Collaboration with Education and Population)</i>	225,000
<b>RESOURCE MEDIA</b> San Francisco, CA <i>For report production and media outreach for the Montreal COP-11: Sao Paulo-CA Side Event</i>	95,000
<b>SAGE FOUNDATION</b> Vancouver, Canada <i>For identifying and communicating potential impacts of climate change specific to Canada's water resources</i>	50,000
<b>SECURING AMERICA'S FUTURE ENERGY FOUNDATION</b> Washington, DC <i>For the Oil ShockWave Education and Reenactment Initiative</i>	150,000
<b>SIERRA CLUB OF CANADA</b> Ottawa, Canada <i>For general support of CAFE Canada program</i>	155,000
<b>SOCIETY OF ENVIRONMENTAL JOURNALISTS</b> Jenkintown, PA <i>For general support</i>	150,000
<i>For general support</i>	300,000
<b>SOUTHWEST ENERGY EFFICIENCY PROJECT</b> Boulder, CO <i>For the Arizona Energy Plan</i>	20,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>STANFORD UNIVERSITY</b> Stanford, CA <i>For a research project to evaluate U.S. policies to reduce U.S. automobile-related gasoline consumption and pollution</i>	275,000
<b>STANFORD UNIVERSITY, INSTITUTE FOR THE ENVIRONMENT</b> Stanford, CA <i>For identification of strategies for California's transition to a low-carbon or no-carbon future</i>	190,000
<b>UNION OF CONCERNED SCIENTISTS</b> Cambridge, MA <i>For the Clean Vehicles Program</i> <i>For the Restoring Scientific Integrity project (Collaboration with Population)</i>	900,000 300,000
<b>UNIVERSIDADE DE SÃO PAULO</b> São Paulo, Brazil <i>For the planning of a new NGO dedicated to energy and the environment</i>	150,000
<b>UNIVERSITY OF CALIFORNIA AT BERKELEY, RICHARD AND RHODA GOLDMAN SCHOOL OF PUBLIC POLICY</b> Berkeley, CA <i>For general support of the Mexican Executive Environmental Program</i>	200,000
<b>WESTERN GOVERNORS' ASSOCIATION</b> Denver, CO <i>For the Clean and Diversified Energy Initiative</i>	250,000
<b>WOODS HOLE RESEARCH CENTER</b> Woods Hole, MA <i>For work with India, China, Brazil, and México to design no-regrets climate mitigation strategies</i>	1,000,000
<b>WORLD RESOURCES INSTITUTE</b> Washington, DC <i>For the China urban transport study</i>	75,000
 <i>Other</i>	
<b>RESOURCE MEDIA</b> San Francisco, CA <i>For the Climate Science Initiative</i>	300,000
 <i>The West</i>	
<b>AGAPE FOUNDATION</b> San Francisco, CA <i>For general support of California Communities Against Toxics</i>	35,000
<b>AMERICAN BAR ASSOCIATION / SECTION OF ENVIRONMENT, ENERGY AND RESOURCES</b> Chicago, IL <i>For the Minority Fellowships in Environmental Law program</i>	30,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>AMERICAN RIVERS</b>	
Washington, DC	
<i>For general support of American Rivers' Hydropower Reform Coalition</i>	1,500,000
<i>For support of the American Rivers involvement in a Supreme Court case to protect the Clean Water Act</i>	30,000
<b>BENEFICENT TECHNOLOGY</b>	
Palo Alto, CA	
<i>For creating a software program to assist environmental organizations in designing, managing, and monitoring conservation programs</i>	250,000
<b>CALIFORNIA STATE UNIVERSITY AT FULLERTON, INSTITUTE FOR ECONOMIC AND ENVIRONMENTAL STUDIES</b>	
Fullerton, CA	
<i>For the California Central Valley Economic and Health Benefit Study</i>	77,133
<b>CENTER FOR COMMUNITY ACTION AND ENVIRONMENTAL JUSTICE</b>	
Riverside, CA	
<i>For general support of the Healthy Communities Campaign Program</i>	50,000
<b>CENTER FOR RESOURCE ECONOMICS</b>	
Washington, DC	
<i>For general support of the Center for Resource Economics' Island Press</i>	200,000
<b>CENTER ON RACE, POVERTY AND THE ENVIRONMENT</b>	
San Francisco, CA	
<i>For general support</i>	75,000
<b>COALITION FOR A SAFE ENVIRONMENT</b>	
Wilmington, CA	
<i>For general support</i>	40,000
<i>For an organizational effectiveness grant to assist in the establishment of a "Strategic Organization Sustainability and Funding Plan" (Collaboration with Philanthropy)</i>	
<i>For a supplemental organizational effectiveness grant to assist in the establishment of a "Strategic Organization Sustainability and Funding Plan" (Collaboration with Philanthropy)</i>	
<b>COLORADO CONSERVATION TRUST</b>	
Boulder, CO	
<i>For the Agricultural Land Trust Assessment Project</i>	75,000
<b>COLORADO ENVIRONMENTAL COALITION</b>	
Denver, CO	
<i>For the Colorado Water Caucus's sustainable water campaign</i>	200,000
<b>COLUMBIA RIVER INTER-TRIBAL FISH COMMISSION</b>	
Portland, OR	
<i>For support for their work on restoring the Columbia River Basin</i>	150,000
<b>COMMUNITY MEDICAL FOUNDATION</b>	
Fresno, CA	
<i>For the Medical Advocates for Healthy Air's scientific symposium on air pollution</i>	40,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>COMMUNITY PARTNERS</b>	
Los Angeles, CA	
<i>For general support of the California Environmental Rights Alliance</i>	170,000
<i>For an organizational effectiveness grant for Community Partners for California Environmental Rights Alliance to create a fund development plan (Collaboration with Philanthropy)</i>	
<b>DEFENDERS OF WILDLIFE</b>	
Washington, DC	
<i>For help in protecting the Endangered Species Act</i>	130,000
<b>ECOFLIGHT</b>	
Aspen, CO	
<i>For general support</i>	150,000
<b>ENVIRONMENTAL JUSTICE COALITION FOR WATER</b>	
Oakland, CA	
<i>For a supplemental organizational effectiveness grant to develop a strategic plan (Collaboration with Philanthropy)</i>	
<b>FOOD ALLIANCE</b>	
Portland, OR	
<i>For support to expand Country Natural Beef, a cooperative of ranchers recognized nationally for their environmental stewardship practices</i>	100,000
<b>FRESNO METRO MINISTRY</b>	
Fresno, CA	
<i>For general support of the Environmental Health Program</i>	160,000
<i>For an organizational effectiveness grant for technology improvements and Web site redesign, and to develop a fund development plan (Collaboration with Philanthropy)</i>	
<b>FRESNO-MADERA MEDICAL SOCIETY</b>	
Fresno, CA	
<i>For creation of a program to coordinate and synchronize physicians working to improve the air quality of the San Joaquin Valley</i>	75,000
<b>GENERATION EARTH</b>	
San Francisco, CA	
<i>For the United Nations Environment Programme's 2005 World Environment Day event in San Francisco</i>	15,000
<b>GITGA'AT DEVELOPMENT CORPORATION</b>	
Hartley Bay, Canada	
<i>For the Hartley Bay Hydropower Project Feasibility Study</i>	90,000
<b>GRAND CANYON TRUST</b>	
Flagstaff, AZ	
<i>For clean energy and sustainable economic development policy in collaboration with Navajo and Hopi communities</i>	50,000
<b>HUMAN INTERACTION RESEARCH INSTITUTE</b>	
Encino, CA	
<i>For development of a resource directory for nonprofit capacity building in the Central Valley region of California</i>	5,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>INTERNATIONAL SUSTAINABLE SYSTEMS RESEARCH CENTER</b> Diamond Bar, CA <i>For conducting an investigation into the best approaches for reducing levels of air pollution in the San Joaquin Valley</i>	52,000
<b>LABOR COMMUNITY STRATEGY CENTER</b> Los Angeles, CA <i>For the Clean Air, Clean Lungs, Clean Buses campaign</i>	50,000
<b>LAND TRUST ALLIANCE</b> Washington, DC <i>For building a National Grasstops Network for Land Trusts</i>	300,000
<b>LATINO ISSUES FORUM</b> San Francisco, CA <i>For general support of the Sustainable Development program</i>	100,000
<b>LIBERTY HILL FOUNDATION</b> Santa Monica, CA <i>For general support of Liberty Hill's Environmental Justice Fund</i>	70,000
<b>MBA-NONPROFIT CONNECTION</b> Palo Alto, CA <i>For a summer MBA job fellowship program for selected environmental organizations</i>	50,000
<b>NATIONAL ENVIRONMENTAL TRUST</b> Washington, DC <i>For general support of the National Environmental Trust's Environmental Policy Public Education Campaign</i>	500,000
<b>NATIONAL WILDLIFE REFUGE ASSOCIATION</b> Washington, DC <i>For engaging new constituencies in five western states</i>	150,000
<b>NATURE CONSERVANCY</b> Arlington, VA <i>For the development of an ecosystem-based management framework for the Great Bear Rainforest</i> <i>For the Conservation Ethic Initiative</i>	28,195 300,000
<b>PACIFIC INSTITUTE FOR STUDIES IN DEVELOPMENT, ENVIRONMENT AND SECURITY</b> Oakland, CA <i>For general support of the Pacific Institute for Studies in Development, Environment and Security's Environmental Justice Coalition for Water</i> <i>For an organizational effectiveness grant for the Environmental Justice Coalition for Water to develop a strategic plan (Collaboration with Philanthropy)</i>	300,000
<b>PACIFIC NEWS SERVICE/NEW CALIFORNIA MEDIA</b> San Francisco, CA <i>For ethnic media air quality fellowships and the ethnic media Environmental Journalism Award</i> <i>For an organizational effectiveness grant for Pacific News Service/New California Media to develop a strategic marketing plan for the organization's national launch (Collaboration with Philanthropy)</i>	30,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>PACOIMA BEAUTIFUL</b> Pacoima, CA <i>For general support</i>	50,000
<b>PEW CHARITABLE TRUSTS</b> Philadelphia, PA <i>For protection of U.S. wilderness in the West</i>	250,000
<b>PHYSICIANS FOR SOCIAL RESPONSIBILITY, LOS ANGELES CHAPTER</b> Los Angeles, CA <i>For an organizational effectiveness grant to improve PSR-LA's external marketing, messaging, and activism strategies via the Internet (Collaboration with Philanthropy)</i>	
<b>POLICYLINK</b> Oakland, CA <i>For general support</i>	70,000
<b>PUBLIC COUNSEL OF THE ROCKIES</b> Aspen, CO <i>For a project to ensure that coalbed methane development is managed with sound environmental controls</i>	150,000
<b>RAND CORPORATION</b> Santa Monica, CA <i>For a study on the benefits and costs of increasing adoption of advanced water efficiency devices and practices</i>	118,000
<b>REDSTONE STRATEGY GROUP, LLC</b> Boulder, CO <i>For documenting and refining Trout Unlimited's Western Water Project strategy</i>	167,075
<b>RELATIONAL CULTURE INSTITUTE</b> Fresno, CA <i>For a project on air quality in the San Joaquin Valley For an organizational effectiveness grant (Collaboration with Philanthropy)</i>	100,000
<b>RESOURCE MEDIA</b> San Francisco, CA <i>For general support of the Energy and Public Lands program</i>	500,000
<b>RESOURCES LEGACY FUND</b> Sacramento, CA <i>For the Land Trust and Conservation Policy Reform Project</i>	150,000
<b>ROCKEFELLER FAMILY FUND</b> New York, NY <i>For general support of the Rockefeller Family Fund's Environmental Grantmakers Association</i>	110,000
<b>SIERRA CLUB OF BRITISH COLUMBIA</b> Victoria, Canada <i>For the Great Bear Rainforest campaign</i>	375,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>SOCIAL AND ENVIRONMENTAL ENTREPRENEURS</b>	
Malibu, CA	
<i>For general support of East Yard Communities for Environmental Justice</i>	35,000
<i>For an organizational effectiveness grant to East Yard Communities for Environmental Justice (Collaboration with Philanthropy)</i>	
<i>For a supplemental organizational effectiveness grant for East Yard Communities for Environmental Justice's fundraising developing planning (Collaboration with Philanthropy)</i>	
<b>SUSTAINABLE ENERGY AND ECONOMIC DEVELOPMENT COALITION</b>	
Austin, TX	
<i>For promoting clean energy policy in Texas</i>	100,000
<b>SUSTAINABLE NORTHWEST</b>	
Portland, OR	
<i>For general support of Sustainable Northwest's Country Natural Beef program</i>	300,000
<b>TAXPAYERS FOR COMMON SENSE</b>	
Washington, DC	
<i>For an organizational effectiveness grant to strategically review the organization's structure, policy work, and advocacy activities (Collaboration with Philanthropy)</i>	
<b>TIDES FOUNDATION</b>	
San Francisco, CA	
<i>For a regranting fund to support the Great Bear Rainforest Agreement</i>	125,000
<i>For creation of a small grants fund to address Canadian oil and gas development</i>	250,000
<i>For the Rainforest Solutions Project</i>	375,000
<i>For support of a campaign to ensure the government keeps its commitment to sign off on the proposed Great Bear Rainforest agreements</i>	150,000
<b>TROUT UNLIMITED</b>	
Arlington, VA	
<i>For general support of Trout Unlimited's Western Water Program</i>	1,060,000
<b>TRUST FOR PUBLIC LAND</b>	
San Francisco, CA	
<i>For general support of the San Francisco Bay Area Community Parks and Playgrounds Program (Collaboration with Regional Grants)</i>	
<b>UNIVERSITY OF MICHIGAN, SCHOOL OF NATURAL RESOURCES AND ENVIRONMENT</b>	
Ann Arbor, MI	
<i>For the National Summit on Diversity in the Environmental Field conference</i>	10,000
<b>UNIVERSITY OF MONTANA</b>	
Missoula, MT	
<i>For general support of the Center for the Rocky Mountain West</i>	200,000
<b>WESTERN CONSERVATION FOUNDATION</b>	
Denver, CO	
<i>For general support</i>	700,000
<b>WESTERN RESOURCE ADVOCATES</b>	
Boulder, CO	
<i>For general support of the Rocky Mountain Energy Campaign</i>	650,000

<b>Environment: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>WILDERNESS SOCIETY</b>	
Washington, DC	
<i>For the Summit 2005, Diverse Partners for Environmental Progress conference</i>	10,000
<i>For general support of the Wilderness Society's campaign to save lands managed by the Bureau of Land Management</i>	1,200,000
<b>YUROK TRIBE</b>	
Klamath, CA	
<i>For support for their work on restoring the Klamath River</i>	150,000

# Global Development

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## *Program Guidelines*

In 2004, the Board of Directors approved the creation of a new Global Development Program, with the mission of “enhancing the conditions for equitable growth in the developing world.” Officially launched in January 2005, the Program is initially focusing on two key areas for policy reform, broadly defined as “aid” and “trade.” These areas have the potential to reap large benefits for poor populations, and currently there is momentum for the reform of both development assistance and trade rules.

These policy goals are undergirded by a strategy of strengthening the knowledge infrastructure relevant to improving development policymaking in the United States and in developing countries. To this end, the Foundation makes grants to improve media coverage of international issues in the United States, and supports policy research and analysis centers globally.

The Global Development Program now includes the Foundation’s work in México, formerly done within a separate U.S.–Latin American Relations Program. The Program has identified three areas for investment in México: transparency and government accountability, in-country philanthropy, and knowledge building for development.

**In 2005, the Global Development Program made grants totaling \$22,424,000.**

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## *Program Report*

### *Reforming Aid Policies*

Although many development advocates have focused on ways to increase the levels of foreign aid available to poor countries, it is equally important to improve the quality of that aid so that increases will translate to real impact on the ground. The Program’s work on aid effectiveness seeks to promote reform by changing U.S. policies on the disbursement of bilateral aid and by improving the evaluation of development projects to ensure that investments are directed toward the most effective types of interventions.

The Foundation started exploratory grantmaking in this area in late 2003 and 2004. The research and recommendations produced under those grants have already significantly influenced the debate on how to improve the effectiveness of U.S. bilateral aid to developing countries through structural reform. To this end, the Program’s grantees are helping to educate key officials and

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Congressional staffers about the need for such reforms and the feasibility of enacting them. The Program's initial grantmaking has helped put the issue of aid reform more firmly on the policy agenda.

Changing current policies also requires a broader coalition of groups advocating for large-scale reforms in the delivery of foreign aid. The Program has provided support to some of the largest and most influential international development organizations, including the One Campaign and Bread for the World, to develop clearer policy positions on aid reform measures. In 2006, the Program also plans to support efforts to enlist both private sector leaders and faith communities in aid policy reform.

To ensure that development assistance funds effective interventions, the Program supports efforts to assess the actual impact of development interventions. In 2005, the Program collaborated with the Center for Global Development and the Gates Foundation to create an evaluation working group. Led by the Center for Global Development, the working group was charged with determining how to encourage development agencies and governments to carry out independent impact assessments and use them to design future interventions. The group's suggestions include: establishing an independent fund to support impact assessments of development projects; funding a cluster of independent impact evaluations of high-visibility interventions; developing quality standards for impact assessments in the field; and building capacity to conduct program evaluations and impact assessments within developing countries. In 2006, the Program will work with the Gates Foundation to follow up on these recommendations.

### *Transparency and Accountability*

In addition to supporting donor policies that allow aid to be used in the most effective ways, the Program also seeks to ensure that resources actually reach their intended beneficiaries, rather than being siphoned off due to mismanagement or corruption. Improving transparency and accountability in the expenditure of public funds may be one of the most important interventions the Foundation can support to transform the lives of people in poor countries. Indeed, private foundations may hold a comparative advantage over other funding sources in supporting civic actors that

monitor government policies and performance, since they must take care to maintain their independence from the governments they monitor.

With the objective of fostering transparency and accountability in public finance, the Program has pursued grantmaking in México to test some of its hypotheses about the best ways to structure its support. The Program is also developing a strategic plan for supporting budget monitoring in other countries.

In just one year of Hewlett Foundation investment in promoting transparency and accountability in México, progress has been made toward extending freedom of information (FOI) laws at the state level and increasing their use. Foundation grantees, led by Libertad de Información-México, helped pass new state FOI laws in Baja California and Campeche, and successfully advocated for significant reform of the law governing the Mexico City Federal District. In 2006, the Global Development Program will support efforts to implement these laws and encourage their widespread use among diverse sectors.

With Hewlett Foundation support, grantees and other advocacy groups in México came together in a joint effort called the Transparency Collective, which created a Web site for making FOI requests, collating responses, and providing information and advocacy tools to the public on information access issues. Monthly meetings and capacity-building workshops hosted by Global Development México staff have led to cooperative strategies among NGOs and the Instituto Federal de Acceso a la Información Pública (IFAI), the federal agency charged with ensuring access to federal government information. In 2006, the Program will continue to provide capacity-building support to the fledgling but highly competent IFAI, provide FOI training for journalists and NGOs, and support collaborative strategies between NGOs and the IFAI for extending user constituencies beyond the Federal District and to disadvantaged populations.

Globally, the Program will further explore work in the following two areas: enhancing the Revenue Watch consortium to improve compliance with the principles of the Extractive Industries Transparency Initiative in oil- and gas-rich countries, and strengthening budget analysis and expenditure tracking capabilities within select countries and regions. The first step in improving budget over-

sight in many countries is to ensure that citizens have access to the information necessary to conduct budget monitoring. Then, citizen groups must be equipped with the necessary technical skills to understand, analyze, and track public expenditures. To this end, the Program will support budget oversight work by various stakeholders—including civil society organizations, think tanks, legislatures, and journalists—at the country level, where tangible impact can be achieved and measured. Assistance to strengthen the data-gathering and technical analysis capabilities of budget policy organizations in several developing countries is needed. The Program's strategy will combine investment in national efforts with support for international organizations that provide training and networking services to emerging budget groups.

#### *In-country and Diaspora Philanthropy*

The Hewlett Foundation has long maintained an interest in strengthening nonprofit organizations and promoting philanthropy. In 2005, the majority of Global Development Program support in this area focused on México. Grants to the Instituto Tecnológico Autónomo de México, Incide Social, and the International Center for Non-profit Law focused on improving the enabling legal and fiscal environment for philanthropy in México. A grant to the Global Equity Initiative at Harvard University explored the viability of increasing and leveraging the social giving potential of the Mexican diaspora. The Program also invested in innovative methods for raising philanthropic dollars in México through support to the Border Philanthropy Project, a multifunder, multi-grantee initiative to strengthen community foundations along the U.S.-México border. In 2006, the Program will continue to focus on the philanthropic enabling environment in México, with the goal of reducing the fiscal and legal obstacles to a robust and sustainable civil sector in the country.

#### Transparency in México: Libertad de Información-México



*The transparency watchdog organization Libertad de Información-México (LIMAC) has played a central role in promoting the rights of Mexican citizens to access government information in their country. A grant from the Hewlett Foundation has helped LIMAC expand and strengthen its network of chapters throughout México and continue its work to advance transparency rights. In 2005, LIMAC provided technical assistance to reform Mexico City's transparency law and assisted legislators in drafting new transparency laws in the states of Campeche and Baja California. LIMAC is working with local governments and other stakeholders to implement the new laws in those states; it is providing legal counseling to civil society organizations, journalists, and individuals who use freedom of information laws; and it will continue to monitor freedom of information compliance across sectors in México.*

## Oxfam: Make Trade Fair Campaign



*Oxfam works in more than 100 countries to find lasting solutions to poverty, suffering, and injustice. Its Make Trade Fair campaign, supported by grants from the Hewlett Foundation, is calling on governments, institutions, and multinational companies to change the rules of international commerce so that global trade can become part of the solution to poverty. Among other issues, the campaign is highlighting the devastating effects of U.S. cotton policies on small cotton farmers in poor countries and helping to bring about changes that will give the poor a chance to gain market share in the world economy. Oxfam provides funding and assistance to farmers in western and southern Africa to help build their capacity and strengthen producer cooperatives. Oxfam is also working with African national governments to pursue fair trade policies through the World Trade Organization.*

### *Greater Access to Markets for Developing Country Agricultural Producers*

The Program supports the reform of trade and farm support policies to level the playing field for developing country agricultural producers in their efforts to garner larger market share for their products. Investments have focused on trade policy in the Doha Round of multilateral trade negotiations and the reform of domestic farm policies in rich countries—most significantly, U.S. farm policy and the European Union’s Common Agricultural Policy.

In 2005, Program grantees advanced policy in both arenas. For example, the Environmental Working Group and Oxfam America, among others, brought to the public’s attention the case for eliminating trade-distorting cotton subsidies that harm farmers in West Africa. The Environmental Working Group also provided critical data on U.S. farm subsidies that formed the backbone of the cotton case brought by Brazil against the United States. In addition, the International Food and Agricultural Trade Policy Council and Oxfam advocated for duty- and quota-free access for the least-developed countries.

Because they provide such large subsidies and so much protection for their farmers, to the detriment of developing countries, industrialized countries should be the first to offer real reforms in the Doha negotiations. But these reforms will ultimately require changes in rich countries’ domestic farm policies. In the United States, this requires reducing farm subsidies that result in overproduction of crops that compete with the farm products from poor countries, and creating incentives for farmers to use their land for non-trade-distorting production. Although Europe recently revised its Common Agricultural Policy, further changes will be necessary to remove price-support measures, income support, and export subsidies. In 2005, organizations supported by the Foundation (through regranting funds given to the

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German Marshall Fund) began to collect and analyze data in EU countries to reveal who actually gets farm subsidies. It turns out that, as in the United States, the largest share of the subsidies goes to large agribusiness rather than small farmers.

With the U.S. Farm Bill coming up for reauthorization in 2007, Program grantees are working to educate a diverse and politically influential set of constituencies about the desirability and feasibility of reforms that can accommodate the needs of rural economies, taxpayers, competitive agricultural growers, other food-related industries, renewable energy producers, and developing country farmers.

### *Knowledge Building for Development*

Achieving the Global Development Program's goals depends on a knowledge infrastructure composed of organizations that develop and disseminate policy ideas and practices essential to development. The Program provides support to media and journalistic institutions that deepen Americans' exposure to global issues, and to research centers and think tanks, especially in the developing world, that focus on global development challenges.

The Program supports shows like Link TV's *Mosaic*, a daily television and Internet broadcast of translated news from Middle Eastern broadcasters that directly reaches several million households and also provides footage and assistance to other news outlets. In 2005, *Mosaic* won a prestigious Peabody Award. In 2005, the Program also worked with the Ford and MacArthur Foundations and the Independent Television Service to launch the International Media Development Fund to commission documentaries by foreign filmmakers for broadcast in U.S. markets. In addition, the Program sponsored opportunities for foreign and U.S. journalists to collaborate and supported overseas training for the editorial gatekeepers of several media outlets.

With respect to research institutes, a grant to Oxford University supported the development of a research consortium of centers in five developing countries and the United Kingdom to produce policy-relevant research on institutional reforms needed to promote government accountability and pro-poor growth in South Asia and sub-Saharan Africa.

## *Agricultural Trade Barriers*

**AMERICAN FARMLAND TRUST**

Washington, DC

*For the development of viable agricultural policy options that serve rural interests in the United States and developing countries for discussion during the reauthorization of the U.S. farm bill in 2007*

\$700,000

**BREAD FOR THE WORLD INSTITUTE**

Washington, DC

*For general support*

500,000

**CARNEGIE ENDOWMENT FOR INTERNATIONAL PEACE**

Washington, DC

*For the Trade, Equity, and Development Program's project, "Making Global Economic Integration More Equitable: Improving Outcomes in India and Brazil," which will examine the impact of proposed trade policies on workers and the poor in India and Brazil*

450,000

**ENVIRONMENTAL DEFENSE**

Oakland, CA

*For a project to analyze how proposed reforms for the U.S. farm bill reauthorization in 2007 will affect commodity prices and market opportunities for farmers in developing countries*

250,000

**ENVIRONMENTAL WORKING GROUP**

Washington, DC

*For general support*

400,000

**GERMAN MARSHALL FUND OF THE UNITED STATES**

Washington, DC

*For the European Farm Subsidy Data project, which will publish data on farm subsidy payments in the European Union, thereby increasing the transparency of EU policies and facilitating an informed debate on the objectives of EU farm policy*

100,000

**INTERNATIONAL CENTRE FOR TRADE AND SUSTAINABLE DEVELOPMENT**

Geneva, Switzerland

*For activities associated with the WTO's Sixth Ministerial Conference to ensure the participation of traditionally disadvantaged stakeholders in the trade policy arena and to analyze potential outcomes and next steps post-conference*

186,000

**INTERNATIONAL POLICY COUNCIL ON AGRICULTURE, FOOD AND TRADE**

Washington, DC

*For a project that assesses the key issues and evaluates the various proposals emerging from the Doha Development Round negotiations*

200,000

**OXFAM GB**

Cowley, United Kingdom

*For general support of the Make Trade Fair campaign (Collaboration with Special Projects)*

735,000

**PACIFIC INSTITUTE FOR STUDIES IN DEVELOPMENT, ENVIRONMENT AND SECURITY**

Oakland, CA

*For a study on the evolving role of international standards and certification in global commerce and trade policy*

70,000

## *In-country & Diaspora Philanthropy*

<b>FUNDACIÓN DEL EMPRESARIADO CHIHUAHENSE</b> Chihuahua, México <i>For a resource center model to strengthen civil society organizations in Chihuahua</i>	175,000
<b>FUNDACIÓN DEL EMPRESARIADO EN MÉXICO</b> Mexico City, México <i>For an organizational effectiveness grant (Collaboration with Philanthropy) For the technical design of the FUNDEMEX funding mechanism</i>	135,000
<b>FUNDACIÓN DEL EMPRESARIADO SONORENSE</b> Hermosillo, México <i>For evaluating and refining local fundraising strategies</i>	15,000
<b>HARVARD UNIVERSITY</b> Cambridge, MA <i>For work on Diaspora Philanthropy in México</i>	150,000
<b>HISPANICS IN PHILANTHROPY</b> San Francisco, CA <i>For replication of its funders collaborative model in México</i>	75,000
<b>INICIATIVA CIUDADANA Y DESARROLLO SOCIAL</b> Mexico City, México <i>For work on fiscal reform developed by ITAM that benefits civil society organizations in México</i>	90,000
<b>INSTITUTO TECNOLÓGICO AUTÓNOMO DE MÉXICO</b> Mexico City, México <i>For the Philanthropy and the Development of Civil Society in México project</i>	150,000
<b>INTERNATIONAL CENTER FOR NOT-FOR-PROFIT LAW</b> Washington, DC <i>For the Partners Improving Laws Affecting Philanthropy project</i>	190,000
<b>SOCIEDAD MEXICANA PRO DERECHOS DE LA MUJER</b> Mexico City, México <i>For developing a fundraising plan for Women's Philanthropy in México</i>	15,000

## *Knowledge Infrastructure*

<b>AMERICANS FOR INFORMED DEMOCRACY</b> New Haven, CT <i>For general support to achieve AID's mission of raising awareness in the United States about world opinions of American foreign policy</i>	50,000
<b>ASPEN INSTITUTE COMMUNICATIONS AND SOCIETY PROGRAM</b> Washington, DC <i>For continued support of the Communications and Society Program's Arab–United States Media Forum, which brings together journalists from the United States and Arab worlds to bridge the divide between the journalistic approaches in each region to improve coverage in both</i>	200,000

<b>Global Development: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>CARNEGIE ENDOWMENT FOR INTERNATIONAL PEACE</b> Washington, DC <i>For distribution of Foreign Policy, a magazine focusing on international trends and global issues, to journalists, editors, and producers of radio and television news programs</i>	100,000
<b>CENTRO DE INVESTIGACIÓN Y DOCENCIA ECONÓMICAS</b> Mexico City, México <i>For general support of the law program PRENDE</i>	450,000
<b>CENTRO REGIONAL DE INVESTIGACIONES MULTIDISCIPLINARIAS DE LA UNIVERSIDAD NACIONAL AUTÓNOMA DE MÉXICO</b> Cuernavaca Morelos, México <i>For general support of CRIM's Migration Research Program</i>	100,000
<b>EDUCATIONAL BROADCASTING CORPORATION</b> New York, NY <i>For continued support of Wide Angle, a PBS documentary series on international topics</i>	1,000,000
<b>GREATER WASHINGTON EDUCATIONAL TELECOMMUNICATIONS ASSOCIATION</b> Arlington, VA <i>For continuation of the By The People project</i>	1,000,000
<b>INDEPENDENT TELEVISION SERVICE</b> San Francisco, CA <i>For the launch of the public-private International Media Development Fund, a documentary and journalistic production initiative to bring international perspectives to American television audiences</i>	2,000,000
<b>INSTITUTO MEXICANO PARA LA COMPETITIVIDAD</b> Mexico City, México <i>For general support</i>	500,000
<b>INTER-AMERICAN DIALOGUE</b> Washington, DC <i>For a project to help establish institutional capacity in Central America for research, technical assistance, exchanges, and public education on trade-related issues</i>	100,000
<b>INTERNATIONAL CENTER FOR JOURNALISTS</b> Washington, DC <i>For the conference "Bridging the Gap: Misunderstandings and Misinformation in the Arab and U.S. Media"</i>	20,000
<b>JOHNS HOPKINS UNIVERSITY, THE PAUL H. NITZE SCHOOL OF ADVANCED INTERNATIONAL STUDIES</b> Baltimore, MD <i>For support of a joint fellow position at the School of Advanced International Studies and the Institute for International Economics</i>	85,000
<b>JOHNS HOPKINS UNIVERSITY, SCHOOL OF ADVANCED INTERNATIONAL STUDIES</b> Baltimore, MD <i>For continued support of the International Reporting Project, which aims to increase Americans' understanding of global issues by training U.S. journalists and providing them with firsthand overseas reporting opportunities</i>	250,000

<b>Global Development: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>LINK MEDIA</b> San Francisco, CA <i>For general support of Link TV</i>	1,500,000
<b>OXFORD UNIVERSITY</b> Oxford, United Kingdom <i>For developing a research consortium of centers in five developing countries and the United Kingdom to produce policy-relevant research on institutional reforms needed to promote government accountability and pro-poor growth in South Asia and sub-Saharan Africa</i>	250,000
<b>PUBLIC RADIO INTERNATIONAL</b> Minneapolis, MN <i>For the Global Resource Service, which works with local stations to infuse their content with global perspectives and raise the capacity of local reporters to create "local/global content"</i>	500,000
<b>RELIEF INTERNATIONAL</b> Los Angeles, CA <i>For continued support of the Global Citizenship and Youth Philanthropy project, which educates middle schoolers in the United States about global and philanthropic issues by connecting them with their counterparts in developing countries</i>	300,000
<b>TIDES CENTER</b> Washington, DC <i>For the creation of Editors' World, a journalism organization whose purpose is to redefine and improve the coverage of international subject matter in mainstream and alternative news organizations in the United States</i>	200,000
<b>TIDES FOUNDATION</b> San Francisco, CA <i>For the Connect US fund and network, which supports collaborative projects through a growing network of U.S. nonprofit organizations to promote a common vision of the United States acting as a responsible global citizen in an interdependent world</i>	1,000,000
<b>UNIVERSITY OF SAN DIEGO, TRANS-BORDER INSTITUTE</b> San Diego, CA <i>For a project to generate and disseminate research on justice reform in México</i>	150,000
<b>UNIVERSITY OF SOUTHERN CALIFORNIA, COLLEGE OF LETTERS, ARTS AND SCIENCES</b> Los Angeles, CA <i>For a research project entitled "The Craft of Think-Tank Institution Building" (Collaboration with Population)</i>	25,000
<b>WGBH</b> Boston, MA <i>For continued support of Frontline World, a public television news magazine series on global affairs</i>	1,000,000

## Official Development Assistance

### CARE

Atlanta, GA

<i>For general support of the ONE Campaign</i>	1,200,000
<i>For the multi-organizational ONE Campaign to mobilize action by citizens and policymakers advocating for a greater U.S. role in combating extreme poverty leading up to the G8 and MDG meetings</i>	200,000

### CENTER FOR STRATEGIC AND INTERNATIONAL STUDIES

Washington, DC

<i>For a case study of U.S. aid to Pakistan designed to inform broader recommendations on U.S. assistance to fragile states</i>	171,000
<i>For a series of educational leadership forums for foreign assistance policy professionals in Congress and the Executive branch</i>	80,000

### GLOBAL PARTNERSHIPS

Seattle, WA

<i>For the Initiative for Global Development to expand its network of business and civic leaders, whose mission is to encourage U.S. leadership in the elimination of extreme global poverty</i>	250,000
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### MASSACHUSETTS INSTITUTE OF TECHNOLOGY, POVERTY ACTION LABORATORY

Cambridge, MA

<i>For the Poverty Action Lab to launch a training course on randomized evaluations of development projects in poor countries, for both domestic and international policymakers, NGOs, government agencies, international organizations, and academics</i>	200,000
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### MICHIGAN STATE UNIVERSITY

East Lansing, MI

<i>For the Partnership to Cut Hunger and Poverty in Africa to complete an organizational assessment, develop a three-year strategic plan, and develop an external communication strategy (Collaboration with Philanthropy)</i>	
<i>For the Partnership to Cut Hunger &amp; Poverty in Africa to build a coalition to advocate for improvements in U.S. policies related to emergency food aid procurement and distribution</i>	250,000

### PLANUSA

Warwick, RI

<i>For the coordination and policy planning activities of the Global NGO Executive Group, a group of chief executives of America's largest international relief and development organizations</i>	270,000
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## Special Opportunities

### AFRICAN VIRTUAL UNIVERSITY

Nairobi, Kenya

<i>For a program entitled "Bandwidth Consolidation for Partnership Universities" sponsored by the Partnership for Higher Education in Africa (Collaboration with Special Projects, Education, and Population)</i>	100,000
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### COUNCIL ON FOREIGN RELATIONS

Washington, DC

<i>For general support of the Council on Foreign Relations' Center for Universal Education (Collaboration with Education and Population)</i>	
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<b>Global Development: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>GLOBAL CAMPAIGN FOR EDUCATION</b> Brussels, Belgium <i>For general support (Collaboration with Education and Population)</i>	75,000
<b>Transparency &amp; Accountability</b>	
<b>ARTICLE 19</b> London, United Kingdom <i>For transparency and access to information work in México</i>	400,000
<b>BROOKINGS INSTITUTION</b> Washington, DC <i>For a project to help developing countries achieve faster progress by improving transparency and accountability and enhancing innovation in development financing</i>	500,000
<b>CONSEJO CIUDADANO DEL PREMIO NACIONAL DE PERIODISMO</b> Mexico City, México <i>For general support for FOIA Training for Journalists in México</i>	340,000
<b>INSTITUTO FEDERAL DE ACCESO A LA INFORMACIÓN PÚBLICA</b> Mexico City, México <i>For a project to extend use of México's access to information laws</i> <i>For the Third International Conference on Government Transparency</i>	1,000,000 40,000
<b>LIBERTAD DE INFORMACIÓN MÉXICO</b> Mexico City, México <i>For general support to promote state-level FOIA in México</i>	872,000
<b>NATIONAL SECURITY ARCHIVE FUND</b> Washington, DC <i>For the FOIA México Project</i>	620,000
<b>PRESENCIA CIUDADANA MEXICANA</b> Mexico City, México <i>For promotion of FOIA among environmental groups in México</i>	100,000
<b>PROYECTO FRONTERIZO DE EDUCACIÓN AMBIENTAL</b> Tijuana, México <i>For work on promoting government transparency in Baja California, México</i>	150,000
<b>UNIVERSITY OF CALIFORNIA AT SANTA CRUZ, LATIN AMERICAN AND LATINO STUDIES DEPARTMENT</b> Santa Cruz, CA <i>For a project entitled "Putting México's Information Disclosure Reforms into Practice: A Rural Civil Society Strategy"</i>	240,000

# Performing Arts

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## *Program Guidelines*

The Performing Arts Program is founded on the premise that the experience, understanding, and appreciation of artistic expression give value, meaning, and enjoyment to people's lives. Its mission is to support artistic expression and its enjoyment through grantmaking aimed at sustaining high-quality San Francisco Bay Area performing arts organizations. The Program aims to achieve this through the following broad objectives:

- Stimulating increased access to and participation in the arts
- Increasing exposure to and understanding of diverse cultural expressions
- Enhancing opportunities for creative expression for both artists and audiences
- Promoting long-term organizational health

In order to reach these objectives, the Performing Arts Program has strategies that include:

- Long-term investment through ongoing, multiyear operating support with the shared goals of artistic/programmatic vitality, community engagement, and organizational health
- Use of mutually agreed upon, individually tailored incentives when needed to leverage organizational change, such as staff development, cash reserves, and challenge grants to enhance the stability of arts organizations
- Addressing the challenges and opportunities that an expensive, highly competitive Bay Area real estate market has created for arts organizations that need affordable performance, rehearsal, and administrative space
- A leadership role and participation in regional or national initiatives that affect Bay Area arts organizations and the field
- Research and promulgation of field-wide best practices

The Program's primary strategy is to make general operating support grants, typically three years in duration. In any one year, 70 to 80 percent of the Performing Arts Program portfolio consists of organizations receiving general operating support. The remaining portion is typically designated for support of new applicants and special initiatives.

The Program's geographic focus is the nine counties that border the San Francisco Bay: Alameda, Contra Costa, Santa Clara, San

Mateo, San Francisco, Marin, Napa, Sonoma, and Solano, with limited funding in Santa Cruz and Monterey counties. Within the disciplines of dance, film, media, music, musical theater, opera, and theater, the Program supports the following types of organizations: producing, presenting, service, training and participation, and national and nonresident organizations that serve Bay Area performing artists and audiences.

The Program gives preference to independent nonprofit Bay Area organizations with an established record of artistic achievement, administrative capacity, audience support, and realistic planning and implementation for artistic and organizational development. The Performing Arts Program does not typically fund one-time events such as fundraisers, festivals, and touring costs for performing companies; humanities, literary, or visual arts; film and video production; recreational, therapeutic, and social service arts programs; cultural foreign exchange programs; individual artists directly; or schools, colleges, and universities.

**In 2005, the Performing Arts Program made grants totaling \$14,985,500.**

Since 1966, the Performing Arts Program has awarded 1,870 grants totaling \$188 million primarily to performing arts organizations in the San Francisco Bay Area. Both the scale of the funding and the singular nature of multiyear general operating support have made the Hewlett Foundation a key investor in the region's cultural life. Since 2002, the Foundation has been the Bay Area's largest foundation funder of the arts.

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*Program  
Report*

### *Diverse Artistic Organizations and Audiences*

Over the past two years, the Program has expanded and diversified its grantee portfolio with an emphasis on aesthetic breadth and geographic representation, especially in the areas of traditional and contemporary arts and underrepresented constituencies. In 2005, twelve new grantees were added, representing a broad cross section of aesthetics and audiences, such as ethnic music presenter Door Dog Music Productions/San Francisco World Music Festival, theater incubator PlayGround, contemporary dance company Robert Moses' Kin, Theatre Rhinoceros, Youth Speaks, and ZeroOne San Jose, an organization presenting work that integrates arts and tech-



### Engaging the Bay Area Community in the Arts

*In order to serve the diverse artistic interests of Bay Area residents, the Performing Arts Program annually makes grants to organizations that are dedicated to encouraging community members and youth to become involved in the arts, not only as audience members, but also as participants. In 2005, the Foundation made a grant to the Young Musicians Program, based at UC Berkeley—one of the nation’s leading music training programs for youth. The program enrolls musically gifted youth from low-income families in the Bay Area and provides them with music education, academic reinforcement, and personal guidance. The Foundation also made grants to the East Bay Center for the Performing Arts, which provides arts education opportunities for the low-income, multi-ethnic community of Richmond and surrounding areas.*

nology. In 2006, the Program plans to continue its efforts to broaden the aesthetic and geographic diversity of its arts portfolio in order to improve the access and breadth of performing arts activities available for San Francisco Bay Area residents. Plans also include conducting internal evaluations of the Program’s grantmaking to intermediary organizations and to music organizations in order to assess the quality and effectiveness of their respective work toward meeting Performing Arts Program goals.

### Arts Education

With the dual goals of improving the quality of arts education for California public school children and creating arts audiences for the future, the Program increased funding for arts education programs and organizations in collaboration with the Education, Regional Grants, and Special Projects Programs. Pilot grants totaling \$1.3 million were made to explore the potential for achieving systemic reforms to increase access to arts education for all students in the public schools across the state. The Program awarded grants for research, community organizing and policy advocacy, and model demonstration programs to SRI International, the Alameda County Office of Education for the Alliance for Arts Learning Leadership, and the California County Superintendents Educational Services Association (CCSESA). As an example, a key element of the grant to CCSESA will be its work with educators and arts education practitioners from across the state in identifying short-term and long-term opportunities for policy change to increase arts education for California’s public school children. Over the next year, the Program proposes to make an additional \$3 million in grants in this area.

### Cultural Facilities

To create new permanent, affordable performing arts space in the San Francisco Bay Area, the Program has

supported cultural facility projects for anchor organizations. Cultural facility grants have been made mainly through an intermediary grantee organization, the Northern California Community Loan Fund. Two years ago, the Hewlett Foundation awarded \$3.5 million to the Fund to provide individual technical assistance and capital grants to performing arts facility projects. With the counsel of a thirteen-member advisory committee, \$2.3 million in grants were awarded in 2005 to eight facility projects in San Francisco, Berkeley, Oakland, Vallejo, and Santa Rosa. These include Brava!, California Shakespeare Theater, East Side Arts Alliance, the Julia Morgan Center for the Arts, ODC/Dance Company, San Francisco Girls Chorus, Santa Rosa Symphony/Green Music Center, and Vallejo Community Arts Foundation. In addition, the Foundation awarded \$1 million to the East Bay Center for the Performing Arts for the acquisition and renovation of its facility. When completed, a projected total of 215,000 square feet in new permanent performing arts space will have been created.

Three facility projects were completed in 2005, comprising a total of 33,000 square feet in new performing arts space for the following organizations: the Community School of Music and Arts, which has won a number of design awards; Margaret Jenkins Dance Company; and Ninth Street Independent Film Center. Planned for completion in 2006 is the eagerly awaited 23,000-square-foot ODC dance center.

In 2006, the Program will sustain its commitment to providing affordable space with limited direct grants to anchor performing arts organizations in the Bay Area and through the Northern California Community Loan Fund.

### Providing Opportunities for Emerging Artists

*The Performing Arts Program is committed to supporting artists early in their careers. In 2005, the Program announced a grant to the Montalvo Association's artist residency program, which will allow ten Bay Area performance artists to hone their craft during a residency at the Villa Montalvo cultural campus in Saratoga, California. In collaboration with the Wallace Alexander Gerbode Foundation, the Hewlett Foundation began a three-year investment in the careers of promising artists with the announcement of the 2005 Emerging Choreographer Awards, which will support the creation, production, and presentation of new dance compositions at non-profit Bay Area performing arts organizations. The foundations will fund commissions for young playwrights in 2006 and composers in 2007. The Foundation also made a grant to support the Yerba Buena Center for the Arts, which emphasizes the creation of new contemporary work.*



*Dance*

<b>BALLET SAN JOSE SILICON VALLEY</b> San Jose, CA <i>For general support</i>	\$110,000
<b>BERKELEY CITY BALLET</b> Berkeley, CA <i>For general support</i>	15,000
<b>CHHANDAM CHITRESH DAS DANCE COMPANY</b> San Francisco, CA <i>For general support</i>	120,000
<b>DANCERS GROUP</b> San Francisco, CA <i>For general support</i>	150,000
<b>DIMENSIONS DANCE THEATER</b> Oakland, CA <i>For general support</i>	111,000
<b>LINES CONTEMPORARY BALLET</b> San Francisco, CA <i>For general support</i>	300,000
<b>NEW ENGLAND FOUNDATION FOR THE ARTS</b> Boston, MA <i>For general support of the San Francisco Bay Area Regional Dance Development Initiative</i>	100,000
<b>OBERLIN DANCE COLLECTIVE</b> San Francisco, CA <i>For general support</i>	300,000
<b>PENINSULA BALLET THEATRE</b> San Mateo, CA <i>For general support</i>	105,000
<b>ROBERT MOSES' KIN</b> San Francisco, CA <i>For general support</i>	20,000
<b>SAN FRANCISCO BALLET ASSOCIATION</b> San Francisco, CA <i>For general support of the San Francisco Ballet School</i>	750,000
<b>WORLD ARTS WEST</b> San Francisco, CA <i>For general support</i>	180,000
<b>ZOHAR DANCE COMPANY</b> Palo Alto, CA <i>For general support</i>	105,000

## *Film and Video*

**CENTER FOR ASIAN AMERICAN MEDIA**

San Francisco, CA

*For general support*

100,000

**FILM ARTS FOUNDATION**

San Francisco, CA

*For general support*

150,000

**KQED**

San Francisco, CA

*For SPARK, a collaborative project with the Bay Area Video Coalition*

1,000,000

**SUNDANCE INSTITUTE**

Beverly Hills, CA

*For general support of the Bay Area artists' fellowship program*

75,000

**ZEROONE**

Mountain View, CA

*For production of ZeroOne San Jose: An International Festival of Art on the Edge*

150,000

## *Music*

**AMERICAN BACH SOLOISTS**

San Francisco, CA

*For general support*

135,000

**AMERICAN COMPOSERS FORUM OF SAN FRANCISCO**

San Francisco, CA

*For general support*

150,000

**ASHKENAZ MUSIC AND DANCE COMMUNITY CENTER**

Berkeley, CA

*For general support*

75,000

**BERKELEY SOCIETY FOR THE PRESERVATION OF TRADITIONAL MUSIC**

Berkeley, CA

*For general support*

90,000

**BERKELEY SYMPHONY ORCHESTRA**

Berkeley, CA

*For general support*

210,000

**CALIFORNIA SUMMER MUSIC**

San Francisco, CA

*For general support*

105,000

**CYPRESS PERFORMING ARTS ASSOCIATION**

San Francisco, CA

*For general support*

90,000

**DOOR DOG MUSIC PRODUCTIONS**

San Francisco, CA

*For general support*

15,000

<b>Performing Arts: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>EAST BAY CENTER FOR THE PERFORMING ARTS</b> Richmond, CA <i>For general support</i>	225,000
<b>IVES QUARTET</b> Palo Alto, CA <i>For general support</i>	39,000
<b>KUUMBWA JAZZ SOCIETY</b> Santa Cruz, CA <i>For general support</i>	75,000
<b>LOS CENZONTLES MEXICAN ARTS CENTER</b> San Pablo, CA <i>For supplemental general support funding For development of a long-range business plan (Collaboration with Philanthropy)</i>	60,000
<b>MARIN SYMPHONY ASSOCIATION</b> San Rafael, CA <i>For general support</i>	120,000
<b>MENLO SCHOOL</b> Atherton, CA <i>For general support of Menlo School's Music@Menlo program (Collaboration with Special Projects)</i>	40,000
<b>MIDSUMMER MOZART</b> San Francisco, CA <i>For general support For a one-to-one matching grant</i>	40,000 23,000
<b>MUSIC AT KOHL MANSION</b> Burlingame, CA <i>For general support</i>	45,000
<b>NAPA VALLEY SYMPHONY ASSOCIATION</b> Napa, CA <i>For general support</i>	195,000
<b>OAKLAND EAST BAY SYMPHONY</b> Oakland, CA <i>For general support For support of the Concert Companion Initiative</i>	255,000 200,000
<b>OLD FIRST CENTER FOR THE ARTS/OLD FIRST CONCERTS</b> San Francisco, CA <i>For general support</i>	45,000
<b>ROVA:ARTS</b> San Francisco, CA <i>For general support</i>	39,000
<b>SAN FRANCISCO CHANTICLEER</b> San Francisco, CA <i>For general support</i>	270,000

<b>Performing Arts: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>SAN FRANCISCO CONSERVATORY OF MUSIC</b> San Francisco, CA <i>For general support</i>	420,000
<b>SAN FRANCISCO JAZZ ORGANIZATION</b> San Francisco, CA <i>For general support</i>	300,000
<b>SAN FRANCISCO LIVE ARTS</b> San Francisco, CA <i>For general support</i>	36,000
<b>SAN FRANCISCO SYMPHONY</b> San Francisco, CA <i>For conflict resolution support</i>	30,000
<b>SAN JOSE JAZZ SOCIETY</b> San Jose, CA <i>For general support</i>	150,000
<b>SAN JOSE TAIKO</b> San Jose, CA <i>For general support</i>	75,000
<b>SCHOLA CANTORUM</b> Mountain View, CA <i>For general support and strategic planning</i>	18,000
 <i>Opera/Music Theater</i>	
<b>DIABLO LIGHT OPERA COMPANY</b> Walnut Creek, CA <i>For general support</i>	135,000
 <i>Other Performing Arts</i>	
<b>CALIFORNIA COUNTY SUPERINTENDENTS EDUCATIONAL SERVICES ASSOCIATION</b> Sacramento, CA <i>For the Reinvigorating Arts Education in California project</i>	175,000
<b>COMMUNITY FOUNDATION OF SANTA CRUZ COUNTY</b> Soquel, CA <i>For supplementary predevelopment costs of the Tannery Arts Center</i>	25,000
<b>DJERASSI RESIDENT ARTISTS PROGRAM</b> Woodside, CA <i>For facility upgrade compliance work</i>	40,000
<b>EAST BAY CENTER FOR THE PERFORMING ARTS</b> Richmond, CA <i>For the Winters Building Revitalization Project (Collaboration with Special Projects and Regional Grants)</i>	

<b>Performing Arts: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>JULIA MORGAN CENTER FOR THE ARTS</b> Berkeley, CA <i>For general support of the Lincoln Center Institute program (Collaboration with Education)</i>	150,000
<b>NINTH STREET MEDIA CONSORTIUM</b> San Francisco, CA <i>For general support For a consulting team to examine the equity partnership agreements (Collaboration with Philanthropy)</i>	150,000
<b>SAN FRANCISCO FOUNDATION COMMUNITY INITIATIVE FUNDS</b> San Francisco, CA <i>For general support of San Francisco Classical Voice</i>	75,000

## *Supporting Services*

<b>ALAMEDA COUNTY OFFICE OF EDUCATION</b> Hayward, CA <i>For general support of the Alliance for Arts Learning Leadership program</i>	300,000
<b>ALLIANCE FOR CALIFORNIA TRADITIONAL ARTS</b> Fresno, CA <i>For general support of the California Traditional Arts Advancement Program</i>	120,000
<b>ARTS COUNCIL SILICON VALLEY</b> San Jose, CA <i>For theory of change consultant services for the Artsopolis Marketing Partnership (Collaboration with Philanthropy) For First Act's Engaging Business and Civic Leaders Initiative For general support of the Arts Council Silicon Valley Artsopolis Marketing Partnership</i>	100,000 125,000
<b>BREAD AND ROSES</b> Corte Madera, CA <i>For general support</i>	105,000
<b>BUSINESS-ARTS COUNCIL</b> San Francisco, CA <i>For general support</i>	120,000
<b>CALIFORNIA ARTS COUNCIL</b> Sacramento, CA <i>For a strategic planning process</i>	5,000
<b>CINNABAR ARTS CORPORATION</b> Petaluma, CA <i>For general support</i>	90,000
<b>CREATIVE CAPITAL FOUNDATION</b> New York, NY <i>For regranting to individual artists in California</i>	250,000
<b>CULTURAL ARTS COUNCIL OF SONOMA COUNTY</b> Santa Rosa, CA <i>For general support</i>	80,000

<b>Performing Arts: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>CULTURAL COUNCIL OF SANTA CRUZ COUNTY</b> Santa Cruz, CA <i>For general support</i> <i>For a strategic planning process for the Arts Education Program (Collaboration with Philanthropy)</i>	245,000
<b>DIABLO REGIONAL ARTS ASSOCIATION</b> Walnut Creek, CA <i>For support of a marketing campaign</i>	20,000
<b>DJERASSI RESIDENT ARTISTS PROGRAM</b> Woodside, CA <i>For general support of residencies for Bay Area performing artists</i>	150,000
<b>EIGHTY LANGTON STREET / NEW LANGTON ARTS</b> San Francisco, CA <i>For general support</i>	52,500
<b>FUND FOR FOLK CULTURE</b> Santa Fe, NM <i>For development of a strategic plan (Collaboration with Philanthropy)</i> <i>For general support</i>	25,000
<b>HEADLANDS CENTER FOR THE ARTS</b> Sausalito, CA <i>For general support of residencies for Bay Area performing artists</i>	75,000
<b>KALW PUBLIC RADIO</b> San Francisco, CA <i>For the performing arts reporting component of the Public Service Reporting Project</i>	50,000
<b>LA PEÑA CULTURAL CENTER</b> Berkeley, CA <i>For general support</i>	180,000
<b>LUTHER BURBANK CENTER FOR THE ARTS</b> Santa Rosa, CA <i>For general support of performing arts programs</i>	240,000
<b>MONTALVO ASSOCIATION</b> Saratoga, CA <i>For support of San Francisco Bay Area performing artists participating in the Lucas Artists residency program</i>	200,000
<b>PAJARO VALLEY PERFORMING ARTS ASSOCIATION</b> Watsonville, CA <i>For general support</i>	30,000
<b>SAN FRANCISCO PERFORMING ARTS LIBRARY AND MUSEUM</b> San Francisco, CA <i>For general support</i>	150,000
<b>SRI INTERNATIONAL</b> Menlo Park, CA <i>For a study of arts education in California (Collaboration with Education and Regional Grants)</i>	160,500

<b>Performing Arts: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>STERN GROVE FESTIVAL ASSOCIATION</b> San Francisco, CA <i>For general support</i>	180,000
<b>TIDES, INC.</b> San Francisco, CA <i>For the NonprofitCenters Network's 2005 Collaborating for Success National Conference</i>	10,000
<b>UNIVERSITY OF CALIFORNIA AT BERKELEY</b> Berkeley, CA <i>For the Young Musicians Program for program enhancements and organizational infrastructure development (Collaboration with Regional Grants)</i>	
<b>YERBA BUENA ARTS AND EVENTS</b> San Francisco, CA <i>For the Yerba Buena Arts and Events Yerba Buena Gardens Festival</i> <i>For general support of the Performing Arts Program</i>	75,000 350,000
<b>YOUNG AUDIENCES</b> New York, NY <i>For the Arts for Learning Lesson Plans project</i>	300,000
<b>YOUNG AUDIENCES OF NORTHERN CALIFORNIA</b> San Francisco, CA <i>For general support</i>	225,000

## *Theater*

<b>A TRAVELING JEWISH THEATRE</b> San Francisco, CA <i>For general support</i>	225,000
<b>BERKELEY REPERTORY THEATRE</b> Berkeley, CA <i>For general support</i>	405,000
<b>FIRST VOICE</b> San Francisco, CA <i>For general support</i>	75,000
<b>FORTY-SECOND STREET MOON</b> San Francisco, CA <i>For general support</i>	25,000
<b>IDRIS ACKAMOOOR AND CULTURAL ODYSSEY</b> San Francisco, CA <i>For general support</i>	120,000
<b>MARIN THEATRE COMPANY</b> Mill Valley, CA <i>For general support</i>	165,000
<b>THE MARSH: A BREEDING GROUND FOR NEW PERFORMANCE</b> San Francisco, CA <i>For general support</i>	135,000

<b>Performing Arts: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>NEW CONSERVATORY THEATRE CENTER</b> San Francisco, CA <i>For general support</i>	150,000
<b>OREGON SHAKESPEARE FESTIVAL</b> Ashland, OR <i>For general support</i>	85,000
<b>PLAYGROUND</b> San Francisco, CA <i>For general support</i>	24,000
<b>SAN JOSE MULTICULTURAL ARTISTS GUILD</b> San Jose, CA <i>For general support</i>	75,000
<b>SHAKESPEARE SAN FRANCISCO</b> San Francisco, CA <i>For general support</i>	240,000
<b>SHOTGUN PLAYERS</b> Berkeley, CA <i>For general support</i>	75,000
<b>TEATRO VISIÓN</b> San Jose, CA <i>For general support</i> <i>For staff salary and benefits, and consultant services</i> <i>For support of the development of a marketing plan</i>	135,000 188,000 34,500
<b>THEATRE BAY AREA</b> San Francisco, CA <i>For National Free Theatre Day</i>	20,000
<b>THEATRE OF YUGEN</b> San Francisco, CA <i>For general support</i>	105,000
<b>THEATRE RHINOCEROS</b> San Francisco, CA <i>For general support</i>	25,000
<b>UNIVERSITY OF CALIFORNIA AT SANTA CRUZ</b> Santa Cruz, CA <i>For general support of University of California at Santa Cruz's Shakespeare Santa Cruz</i>	180,000
<b>YOUTH SPEAKS</b> San Francisco, CA <i>For general support of the Living Word Project</i>	175,000
<b>Z SPACE STUDIO</b> San Francisco, CA <i>For general support</i>	150,000

# Philanthropy

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Since 2001, the Hewlett Foundation has made grants to support the field of philanthropy. In 2004, the Board of Directors recognized the Foundation's commitment to this work and approved the creation of a Philanthropy Program.

Philanthropy holds great potential to solve social and environmental problems. Yet many donors and the nonprofits they support stumble in determining appropriate objectives, planning and implementing effective strategies, and monitoring progress. Compared with the business sector and government, there is scant knowledge available to assist foundations and nonprofit organizations in improving their work.

The Philanthropy Program supports organizations dedicated to developing such knowledge and making it freely available to the sector. This knowledge is important to the Hewlett Foundation's work as well. Like any donor, the Foundation must define objectives, determine strategies to achieve those objectives, select grantees, and assess progress. Although the Foundation tries to model good practices, there is still much to learn.

The Philanthropy Program has three primary grantmaking guidelines:

- Developing data on nonprofits
- Advancing knowledge about philanthropy
- Engaging donors in learning about practice

In addition, the Philanthropy Program makes grants to build the organizational capacity of the Foundation's grantees, primarily by bringing in outside experts who assist with planning and evaluation. On a limited basis, the Program also awards opportunity grants to support the nonprofit sector. In 2005, for example, the Program supported a handful of organizations that have led the sector's response to increased government and public scrutiny of foundations.

**In 2005, the Philanthropy Program made grants totaling \$5,587,870.**

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## *Program Guidelines*

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## *Program Report*

The Philanthropy Program seeks to improve the outcomes achieved by nonprofits through advances in data, knowledge, and practice. By supporting data development and research, the Program increases knowledge about planning, evaluation, and management at nonprofits and foundations. In addition, the Program raises

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awareness about good practices in philanthropy and supports programs that engage donors and foundations in learning how to achieve greater results from their giving.

### *Developing Data on Nonprofits*

The Philanthropy Program supports the development of data about nonprofits and resources that make such data available to the public. An increase in public information about nonprofit organizations and programs contributes to research, knowledge sharing, effective funding decisions, and the matching of people in need to the services that can help them.

Examples of near-term indicators of progress under this guideline include growth in the number of nonprofits publicly reporting on their organizations and programs, and an increase in the usage of that information.

*Progress in 2005.* The Philanthropy Program has actively sought to improve the availability of information about nonprofits. Today, tens of thousands of people access nonprofits' organizational and financial data through the National Center on Charitable Statistics and services such as GuideStar and DonorEdge. In an effort to help nonprofit organizations develop plans and make them available to the public, the Program has funded the development of tools by Innovation Network and Keystone. Innovation Network provides services and online tools for nonprofits to create logic models and describe their evaluation plans. Keystone hopes to create a common framework for NGOs in developing countries to report to the public on their plans and progress.

*Plans for 2006.* In 2006, the Program will place a strong emphasis on nonprofit programs and services. In particular, the Program will focus on the continued testing and refinement of planning and evaluation tools and services, involving program staff and some of their grantees. Because efforts to improve program information have faced numerous obstacles, the Program is likely to fund continued experimentation.

### *Advancing Knowledge About Philanthropy*

The Philanthropy Program supports research about philanthropy, with a particular emphasis on knowledge that informs practice at

## Should Nonprofits Seek Profits?

### The Bridgespan Group

*“Many foundations and other funders have been zealously urging nonprofits to become financially self-sufficient. . . . But while the case for earned income may seem persuasive at first glance, a closer look reveals reasons for skepticism. Despite the hype, earned income accounts for only a small share of funding in most nonprofit domains, and few of the ventures that have been launched actually make money. Moreover, when we examined how nonprofits evaluate possible ventures, we discovered a pattern of unwarranted optimism. The potential financial returns are often exaggerated, and the challenges of running a successful business are routinely discounted.”*

—From the results of a study by the Bridgespan Group published in the February 2005 issue of the *Harvard Business Review*

nonprofits and foundations. Examples of near-term indicators of progress include the publication of important studies and an increase in the number of first-rate scholars and practitioners studying philanthropy.

*Progress in 2005.* In 2005, the Program renewed support for the Bridgespan Group, the Center for Effective Philanthropy, and the National Committee on Responsive Philanthropy. The Program also supported the *Stanford Social Innovation Review*, a publication that has been successful in disseminating interesting research and perspectives on nonprofit and foundation management. Over the past year, the *Review* has nearly doubled its subscriptions to 7,000 readers.

Several notable studies relevant to donors were released this year from groups the Program has funded. They include a report from the National Committee on Responsive Philanthropy on conservative foundations, a summary of findings about grantee perceptions of foundations by the Center for Effective Philanthropy, and numerous studies and articles by the Bridgespan Group on topics such as how nonprofits grow and when they should seek to earn income. In 2006, two major projects that the Hewlett Foundation has supported are likely to publish findings, including a study of foundation impact led by Joel Fleishman at Duke University and a study of Bay Area nonprofits led by Walter Powell at Stanford University.

*Plans for 2006.* In the coming year, the Program anticipates making grants to continue to build institutions that can produce high-quality research on philanthropy, including support for faculty and doctoral students at universities.

### *Engaging Donors in Learning About Practice*

The Philanthropy Program supports programs that engage donors, including foundation staff and trustees, in learning about the practice of philanthropy. Near-term indicators of progress include increased coverage of good

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practice at donor education programs and in publications read by donors. Elements that are common to good practice include clear articulation of goals, implementation of strategies to achieve goals, and evaluation of progress. Additional elements that the Program has targeted include awareness of the political and international context for social change and sensitivity to overhead costs necessary for nonprofits to operate.

*Progress in 2005.* Foundations have once again come under harsh scrutiny from governments and the public. State attorneys general, the United States Senate Finance Committee, and the House Ways and Means Committee are inquiring into the practices of the nonprofit sector. In a panel co-convened by Hewlett Foundation President Paul Brest, Independent Sector has led nonprofits and foundations in a constructive response to these inquiries. The panel has produced a report with recommendations on how charities, Congress, and the Internal Revenue Service could strengthen the sector's governance and accountability.

In May 2005, the Program also took the lead in convening a meeting of groups that support philanthropy, from national organizations such as the Council on Foundations to various regional associations of grantmakers. The goal was to consider how foundations could work together with these groups not only to improve the sector's governance and accountability, but its philanthropic practices more broadly. For example, the large majority of foundations do not make general operating support grants, and those that do often have a policy of not renewing the grants. Although the Hewlett Foundation has a strong tradition of making long-term general support grants, it has avoided preaching the virtues of this practice, but rather has helped educate others—especially the myriad family foundations—about the pros and cons of various styles of grantmaking as well as other ways of making their grant dollars effectively achieve their ends.

Most of the Foundation's funding in this area has focused on the education of high net-worth individuals and families whose combined assets are in the tens of billions of dollars. The Philanthropy Workshop West, a project of the Foundation, has been outstanding in helping donors achieve greater impact from their philanthropy.



### Organizational Effectiveness: Ninth Street Media Consortium

*The Ninth Street Media Consortium was incorporated in 2001 as a partnership among four San Francisco–based media arts organizations. That year, the Consortium created an LLC of public and private investors to purchase and renovate a facility in San Francisco. In 2005, an organizational effectiveness grant provided by the Hewlett Foundation enabled the organization to examine its financial structure and assess whether or not it would be more advantageous for the Consortium to buy out its private investors and take full ownership of the facility. As a result, the Consortium bought out its investors, refinanced its mortgage at lower rates—saving nearly \$30,000 per year—and now has one hundred percent ownership of its building, which provides a permanent home for independent arts in the Bay Area.*

The Program has also funded efforts to educate staff at small foundations and family foundations about good practice. The Foundation Incubator is in the process of merging with Indiana University and moving its Bay Area operations to Community Foundation Silicon Valley. As it has grown and evolved, the Incubator has sought to include not only individual donors but also grantmakers from foundations whose combined assets exceed \$16 billion. The Program provided support for Northern California Grantmakers, which many foundation professionals in the San Francisco Bay Area rely on for education and professional development.

*Plans for 2006.* The Program plans to further research how knowledge about practice disseminates through the sector and to explore additional vehicles to promote effective practice. Because foundations find it difficult to learn about planning and evaluation, the Program is looking for promising opportunities to better inform trustees, executives, and staff. In addition, the Program has provided support to Social Venture Partners and The Philanthropy Workshop West for evaluations to track the impact of educational programs about philanthropy.

### *Building the Organizational Capacity of Grantees*

In addition to its engagement in the philanthropic sector, the Philanthropy Program awards funds to help grantees across the Foundation's Programs build their capacity and deliver greater impact. In 2005, the Program awarded \$1 million in organizational effectiveness support. Organizational effectiveness grants range from \$5,000 to \$50,000 and help organizations with strategic planning, communications, technology, evaluation, board development, and/or fundraising. In addition to individual grants, the Foundation has begun to offer group training in communications that builds the capacity of several grantees at a time.

<b>Philanthropy: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>BRIDGESPAN GROUP</b> Boston, MA <i>For general support</i>	\$1,050,000
<b>CENTER FOR EFFECTIVE PHILANTHROPY</b> Cambridge, MA <i>For general support</i>	600,000
<b>COMMUNITY FOUNDATION SILICON VALLEY</b> San Jose, CA <i>For the Philanthropy Incubator</i>	150,000
<b>FORUM OF REGIONAL ASSOCIATIONS OF GRANTMAKERS</b> Washington, DC <i>For the Building Grantmakers Effectiveness and Accountability initiative</i>	150,000
<b>GLOBALGIVING FOUNDATION</b> Bethesda, MD <i>For general support of the organization</i>	800,000
<b>GREATER KANSAS CITY COMMUNITY FOUNDATION</b> Kansas City, MO <i>For the DonorEdge National Center, an online platform for nonprofits to report to donors about their capabilities and performances</i>	700,000
<b>INNOVATION NETWORK</b> Washington, DC <i>For general support</i>	300,000
<b>NONPROFIT QUARTERLY</b> Boston, MA <i>For distribution of a special issue on shifts and proposed shifts in the nonprofit regulatory environment</i>	15,000
<b>NORTHERN CALIFORNIA GRANTMAKERS</b> San Francisco, CA <i>For general support</i>	100,000
<b>SEAWEB</b> Washington, DC <i>For the Philanthropic Awareness Initiative</i>	100,000
<b>SOCIAL VENTURE PARTNERS INTERNATIONAL</b> Seattle, WA <i>For general support</i>	200,000
<b>STANFORD UNIVERSITY</b> Stanford, CA <i>For the Center for Social Innovation</i>	400,000

## Organizational Effectiveness

<b>ARTS COUNCIL SILICON VALLEY</b> San Jose, CA <i>For theory of change consultant services for the Artsopolis Marketing Partnership (Collaboration with Performing Arts)</i>	25,000
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<b>Philanthropy: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>AUSTRALIAN REPRODUCTIVE HEALTH ALLIANCE</b> Deakin West, Australia <i>For a project to improve ARHA's governance and development strategies (Collaboration with Population)</i>	30,000
<b>CALIFORNIANS FOR JUSTICE EDUCATION FUND</b> Oakland, CA <i>For an organizational effectiveness grant (Collaboration with Education)</i>	40,000
<b>CENTER FOR EFFECTIVE PHILANTHROPY</b> Cambridge, MA <i>For an assessment of the current fundraising program and the design and development of a strategic fundraising plan</i>	35,000
<b>CENTRE FOR DEVELOPMENT AND POPULATION ACTIVITIES</b> Washington, DC <i>For an organizational effectiveness grant to develop new marketing materials (Collaboration with Population)</i>	30,000
<b>COALITION FOR A SAFE ENVIRONMENT</b> Wilmington, CA <i>For an organizational effectiveness grant to assist in the establishment of a "Strategic Organization Sustainability and Funding Plan" (Collaboration with Environment)</i>	5,000
<i>For a supplemental organizational effectiveness grant to assist in the establishment of a "Strategic Organization Sustainability and Funding Plan" (Collaboration with Environment)</i>	10,000
<b>COMMUNICATIONS LEADERSHIP INSTITUTE</b> Washington, DC <i>For the 2006 Leadership Development program</i>	66,500
<b>COMMUNITY PARTNERS</b> Los Angeles, CA <i>For an organizational effectiveness grant for Community Partners for California Environmental Rights Alliance to create a fund development plan (Collaboration with Environment)</i>	12,000
<b>CULTURAL COUNCIL OF SANTA CRUZ COUNTY</b> Santa Cruz, CA <i>For a strategic planning process for the Arts Education Program (Collaboration with Performing Arts)</i>	12,500
<b>EDUCATION TRUST – WEST</b> Washington, DC <i>For an organizational effectiveness grant (Collaboration with Education)</i>	30,000
<b>ENVIRONMENTAL JUSTICE COALITION FOR WATER</b> Oakland, CA <i>For a supplemental organizational effectiveness grant to develop a strategic plan (Collaboration with Environment)</i>	12,000
<b>FRESNO METRO MINISTRY</b> Fresno, CA <i>For an organizational effectiveness grant for technology improvements and Web site redesign, and to develop a fund development plan (Collaboration with Environment)</i>	26,000

<b>Philanthropy: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>FUND FOR FOLK CULTURE</b> Santa Fe, NM <i>For development of a strategic plan (Collaboration with Performing Arts)</i>	26,500
<b>FUNDACIÓN DEL EMPRESARIADO EN MEXICO</b> Mexico City, México <i>For an organizational effectiveness grant (Collaboration with Global Development)</i>	15,000
<b>FUNDERS NETWORK ON POPULATION REPRODUCTIVE HEALTH AND RIGHTS</b> Rockville, MD <i>For support for an organizational assessment (Collaboration with Population)</i>	20,000
<b>INDEPENDENT MEDIA INSTITUTE</b> San Francisco, CA <i>For an organizational effectiveness grant to the SPIN Project for consulting, training, and coaching on communications planning for Hewlett grantees</i>	125,000
<b>LOS CENZONTLES MEXICAN ARTS CENTER</b> San Pablo, CA <i>For development of a long-range business plan (Collaboration with Performing Arts)</i>	25,000
<b>MICHIGAN STATE UNIVERSITY</b> East Lansing, MI <i>For the Partnership to Cut Hunger and Poverty in Africa to complete an organizational assessment, develop a three-year strategic plan, and develop an external communication strategy (Collaboration with Global Development)</i>	85,000
<b>NEW SCHOOLS CENTER OF SILICON VALLEY</b> San Jose, CA <i>For the development of a strategic plan and business plan (Collaboration with Education)</i>	32,000
<b>NINTH STREET MEDIA CONSORTIUM</b> San Francisco, CA <i>For a consulting team to examine the equity partnership agreements (Collaboration with Performing Arts)</i>	36,000
<b>PACIFIC INSTITUTE FOR STUDIES IN DEVELOPMENT, ENVIRONMENT AND SECURITY</b> Oakland, CA <i>For an organizational effectiveness grant for the Environmental Justice Coalition for Water to develop a strategic plan (Collaboration with Environment)</i>	5,000
<b>PACIFIC NEWS SERVICE/NEW CALIFORNIA MEDIA</b> San Francisco, CA <i>For an organizational effectiveness grant for Pacific News Service/New California Media to develop a strategic marketing plan for the organization's national launch (Collaboration with Environment)</i>	10,000
<b>PHYSICIANS FOR SOCIAL RESPONSIBILITY, LOS ANGELES CHAPTER</b> Los Angeles, CA <i>For an organizational effectiveness grant to improve PSR-LA's external marketing, messaging, and activism strategies via the Internet (Collaboration with Environment)</i>	5,000
<b>POPULATION COUNCIL</b> New York, NY <i>For a strategic planning process (Collaboration with Population)</i>	30,000

<b>Philanthropy: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>POPULATION REFERENCE BUREAU</b> Washington, DC <i>For development of dissemination and marketing strategies (Collaboration with Population)</i>	30,000
<b>RELATIONAL CULTURE INSTITUTE</b> Fresno, CA <i>For an organizational effectiveness grant (Collaboration with Environment)</i>	5,000
<b>SEAWEB</b> Washington, DC <i>For the Philanthropic Awareness Initiative</i>	30,000
<b>SEXUALITY INFORMATION AND EDUCATION COUNCIL OF THE UNITED STATES</b> New York, NY <i>For leadership and management skills development (Collaboration with Population)</i>	30,000
<b>SOCIAL AND ENVIRONMENTAL ENTREPRENEURS</b> Malibu, CA <i>For an organizational effectiveness grant to East Yard Communities for Environmental Justice (Collaboration with Environment)</i> <i>For a supplemental organizational effectiveness grant for East Yard Communities for Environmental Justice's fundraising developing planning (Collaboration with Environment)</i>	5,000 10,000
<b>SOCIAL VENTURE PARTNERS INTERNATIONAL</b> Seattle, WA <i>For an examination of governance and organizational structure</i> <i>For a leadership development project</i>	15,000 15,000
<b>TAXPAYERS FOR COMMON SENSE</b> Washington, DC <i>For an organizational effectiveness grant to strategically review the organization's structure, policy work, and advocacy activities (Collaboration with Environment)</i>	45,000
<b>TIDES FOUNDATION</b> San Francisco, CA <i>For an organizational effectiveness grant for The Philanthropy Workshop West</i>	34,870
<b>UNIVERSITY OF IOWA, THE WIDERNET PROJECT</b> Iowa City, IA <i>For an organizational effectiveness grant for the WiderNet Project (Collaboration with Education)</i>	22,500
<b>UNIVERSITY OF SAN DIEGO, COMMUNITY COLLEGE LEADERSHIP DEVELOPMENT INITIATIVE</b> San Diego, CA <i>For the Community College Leadership Development Initiative, to train current and future leaders for California's community colleges (Collaboration with Education)</i>	32,000

# Population

The goal of the Population Program is to promote voluntary family planning and good reproductive health outcomes for everyone. The Program is designed to benefit: the world at large, by enabling sustainable rates of population growth; societies, whose members can emerge from a life of bare subsistence; individuals, particularly the physical and emotional health and well-being of women and girls; and children, whose parents want them and have more time to help them mature into responsible and productive adults. Family planning and reproductive health (FP/RH) embraces, but is not limited to, helping women and families choose the number and spacing of children, protecting against sexually transmitted infections, and eliminating unsafe abortion.

In 2004, the Hewlett Foundation's Board of Directors approved a revised strategy for the Population Program and identified three guidelines for grantmaking:

- Improving access to family planning and reproductive health care
- Ensuring adequate resources and evidence-based policies for family planning and reproductive health internationally
- Promoting and protecting the family planning and reproductive health of Americans

**In 2005, the Population Program made grants totaling \$37,779,001.**

## *Improving Access to Family Planning and Reproductive Health Care*

This guideline has two components: improving access to good but underused FP/RH options and strengthening linkages between FP/RH and HIV/AIDS programs. Many of the Program's long-term service delivery grantees are supported under this guideline. In 2006 and future years, these grantees will use the Foundation's general support to improve the FP/RH options of the world's poorest women and men—those living on less than one dollar per day—primarily in sub-Saharan Africa.

*Improving access to underused FP/RH options.* The Program is focusing on expanding access to four technologies:

- Emergency contraception. If taken soon after unprotected intercourse, emergency contraception can substantially reduce the

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chances of a pregnancy occurring. Through the efforts of several grantees, emergency contraception is being made available through public and private sectors in a number of countries.

- Intrauterine devices. Intrauterine devices are an effective, long-term method of birth control. They are particularly well suited for the many women who wish to stop further childbearing but either cannot access or do not want to have sterilization.
- Female condoms. For the next five to seven years at least, female condoms will be the only woman-initiated birth control method that offers protection against both sexually transmitted infections, including HIV/AIDS, and unwanted pregnancy. In September 2005, a global female condom consultation, funded in part by the Foundation, convened all the major stakeholders (health ministries, researchers, donors, women's organizations) to develop concrete plans for expanding the availability of the device.
- Safe abortion technologies (using both medication and surgery). In 2005, the Program continued to provide support to expand access to these options, which reduce the risk of death and disability due to unsafe abortion.

*Strengthening linkages between FP/RH and HIV/AIDS programs.* Despite the obvious overlap in risk behaviors and client populations, governments and donor agencies fund HIV/AIDS and FP/RH through separate vertical programs, with very limited programmatic or policy interface between them. In 2005, the Program's efforts were directed toward identifying concrete and practical ways that HIV/AIDS prevention and FP/RH could be integrated to provide protection from both unwanted pregnancy and sexually transmitted infections. The Program made a grant to the World Health Organization to carry out a comprehensive assessment of the reproductive needs and choices of HIV-positive women and men and to develop appropriate policy and programmatic guidance. The World Health Organization and the United Nations Population Fund launched the guidance in March 2006.

The Foundation's new relationships with HIV/AIDS-focused organizations are also critical to increasing the visibility of this issue over the next several years. In 2005, the Program identified several HIV/AIDS organizations that have demonstrated an interest in link-

ing HIV/AIDS and FP/RH in advocacy, policies, and programs.

### *Ensuring Adequate Resources and Evidence-Based Policies for FP/RH Internationally*

This guideline has five components: examining how population and FP/RH impact poverty reduction and economic growth; informing FP/RH priorities through improved evidence; training the next generation of population scientists; strengthening advocacy for international FP/RH; and the Education in Africa Initiative.

*Examining how population and FP/RH impact poverty reduction and economic growth.* In 2005, the Program supported a working group composed of renowned development economists, donors (including high-level representatives from the World Bank and the International Monetary Fund, as well as from bilateral funders and other foundations), demographers, FP/RH experts, and other stakeholders. The group successfully identified major knowledge gaps that must be filled to better understand the relationship between FP/RH status and poverty at the household level, and between population dynamics and economic growth at the macro level. The research priorities identified include the ways in which reproductive health outcomes influence household poverty status through women's labor supply, productivity, and savings behavior, and how demographic trends condition a country's economic growth prospects.

Based on these priorities, the Program made grants to the African Economic Research Consortium, the World Bank's research division, top development economists in the United States and other industrialized countries, and to the Population Reference Bureau to support U.S. doctoral students' dissertation research and host a competition for funding of centers of excellence in this area of research. Complementary research was identified in 2005, and will be supported in 2006, to better understand the economic costs of unsafe abortion in



### Improving Health Outcomes in Africa: African Population and Health Research Center

*The nonprofit African Population and Health Research Center is helping to recruit and train the next generation of African population and health scientists. At the Center, based in Nairobi, Kenya, African scholars engage in policy research on health problems in urban slums, HIV/AIDS, youth reproductive health, and the linkages between population and poverty in sub-Saharan Africa. In the slums of Nairobi, the Center has set up the Nairobi Urban Health and Poverty Project, a field-based research effort to determine the most efficient and effective strategies for improving the lives of Africa's urban poor.*

*Through continuous monitoring of various population and health problems and through dialogue with policymakers and other stakeholders, the Center also seeks to play a leading role in the early identification of potential health problems on the continent.*

## Advancing the Reproductive Freedom of Women: The Center for Reproductive Rights



*The Hewlett Foundation has been a strong supporter of the Center for Reproductive Rights, a nonprofit legal advocacy organization that promotes and defends the reproductive rights of women worldwide. The Center's guiding principle is that individuals have a right to comprehensive health care, including family planning and contraception. To advance its mission, the Center studies national laws and policies that affect contraceptive access for women around the world; it examines legal issues surrounding contraceptive care in the United States; and it undertakes initiatives to make emergency contraception more readily available domestically and internationally. The Center has helped define the course of reproductive rights law in the United States and has strengthened reproductive health laws and policies across the globe by working with more than 100 organizations in 45 nations.*

terms of morbidity and mortality. The U.K. Department for International Development and the French Ministry of Development Cooperation are jointly sponsoring a European meeting based on this research agenda, with researchers, experts, policymakers, and funders from Francophone and Anglophone Europe and Africa.

*Informing FP/RH priorities through improved evidence.* The revised Program strategy identified several research priority areas, including understanding why reductions in fertility have stalled, the demographic impact of HIV/AIDS in Africa, and the status of women and girls and their life options in current fertility transitions. In 2005, the Program made grants to some long-term grantees, such as the Population Council and the Population Reference Bureau, to undertake this research. Program staff will support efforts in 2006 to bring groups together at professional meetings in order to share information and discuss methodological innovations and areas of promising research.

*Training the next generation of population scientists.* The Hewlett Foundation is the last major U.S. foundation still supporting postgraduate training in population science. Because of the importance of ensuring that sub-Saharan Africa has a sufficient number of trained demographic experts who can help design their countries' FP/RH policies and programs, the Foundation's Board of Directors approved a shift in focus from North American institutions to African training institutions.

In 2005, Program staff, in consultation with a large number of experts, identified and made field visits to African universities with a strong record of training programs in population science that also received policy and programmatic support from their government. Based on this due diligence, the Program awarded grants to five universities—two in South Africa, two in Ghana, and one in Kenya. The Program continues to support a small number of North American universities with demonstrated interest and ability to work with African training

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programs through mutually beneficial and respectful exchanges. These investments not only provide support to African training programs through partnerships and networks, but also maintain interest among U.S. and other developed country scholars in African FP/RH and demography.

*Strengthening advocacy for international FP/RH.* The Foundation has long supported U.S. and international grantees with the mission of strengthening commitment to international FP/RH. In 2005, the Program evaluated advocacy NGOs outside the United States, with a particular emphasis on how their work should incorporate the Millennium Development Goals, collaborate with developing country partners, and accommodate states entering the European Union. The Program anticipates evaluating the U.S.-based advocacy grantees in 2006.

*Education in Africa Initiative.* In 2005, the Foundation's Board of Directors approved a recommendation to spend the next two years actively exploring the Foundation's potential to have a long-term impact in providing universal education, particularly in some of the most resource-poor countries in sub-Saharan Africa.

#### *Promoting and Protecting the FP/RH of Americans*

This guideline has two components: ensuring good FP/RH policies and services for all Americans and teen pregnancy prevention in California (in collaboration with the Regional Grants Program).

*Ensuring good FP/RH policies and services for all Americans.* This guideline supports anchor institutions that protect the reproductive rights of Americans and help ensure access to high-quality services to all who need and want them. In 2005, the Program provided general support to several long-term Foundation grantees such as the National Abortion Federation, the Guttmacher Institute, and the American Civil Liberties Union.

Also in 2005, the Program sought to broaden the base of constituencies supporting reproductive health and rights. The Program provided support to the National Latina Institute for Reproductive Health, the only national organization to work on access to FP/RH education and services for Latinas, one of the most underserved yet fastest-growing populations in the United States. The Program also

awarded a grant to the Family Violence Prevention Fund to explore whether violence prevention messages engage a new group of supporters for reproductive health and rights, especially younger women and communities of color. In 2006 and beyond, the Program will continue to research organizations representing the FP/RH needs of diverse communities and to build bridges to other movements.

*Teen pregnancy prevention in California.* In 2005, the Regional Grants and Population Programs collaborated on grants to offer expanded outreach services to teens and to evaluate the effectiveness of these efforts. One was to the New Generation Health Center in San Francisco to target high-risk young women with intensive outreach and follow-up services at the youth clinic. Program support is coupled with an evaluation by an external agency to determine if this more intensive involvement with clients yields better outcomes than the current standard of care. Another grant was to the Planned Parenthood Mar Monte's Teen Success Program, which serves pregnant and parenting teens and seeks to prevent second pregnancies within this population.

In 2006, the Program plans to focus on successful service delivery models for teen pregnancy prevention for vulnerable youth in the Bay Area and Central Valley. As the initial results of this year's grants and research become available, the Program will also bring together grantees and stakeholders to learn from their shared experiences.

## *Domestic Family Planning and Reproductive Health*

<b>ALAN GUTTMACHER INSTITUTE</b> New York, NY <i>For general support</i>	\$2,050,000
<b>AMERICAN CIVIL LIBERTIES FOUNDATION OF NORTHERN CALIFORNIA</b> San Francisco, CA <i>For general operating support</i>	50,000
<b>AMERICAN CIVIL LIBERTIES UNION FOUNDATION</b> New York, NY <i>For general support of the American Civil Liberties Union's Reproductive Freedom Project</i>	650,000
<b>ASSOCIATION OF REPRODUCTIVE HEALTH PROFESSIONALS</b> Washington, DC <i>For the Emergency Contraception Hotline and Web site</i>	400,000
<b>COLUMBIA UNIVERSITY, MAILMAN SCHOOL OF PUBLIC HEALTH</b> New York, NY <i>For general support of Columbia University's Heilbrunn Center for Population and Family Health</i>	700,000
<b>FAMILY VIOLENCE PREVENTION FUND</b> San Francisco, CA <i>For efforts linking violence prevention and reproductive health issues</i>	400,000
<b>MS. FOUNDATION FOR WOMEN</b> New York, NY <i>For support of grantmaking and networking activities around comprehensive sexuality education</i>	450,000
<b>NATIONAL ABORTION FEDERATION</b> Washington, DC <i>For general support</i>	800,000
<b>NATIONAL LATINA INSTITUTE FOR REPRODUCTIVE HEALTH</b> New York, NY <i>For general support</i>	375,000
<b>NATIONAL PARTNERSHIP FOR WOMEN AND FAMILIES</b> Washington, DC <i>For general support</i>	100,000
<b>NEW SCHOOL UNIVERSITY, GRADUATE FACULTY OF POLITICAL &amp; SOCIAL SCIENCE</b> New York, NY <i>For a conference focusing on issues with the environment, health, and energy (Collaboration with Environment and Special Projects)</i>	25,000
<b>PLANNED PARENTHOOD FEDERATION OF AMERICA</b> New York, NY <i>For coalition communications efforts</i>	200,000
<b>PLANNED PARENTHOOD MAR MONTE</b> San Jose, CA <i>For support of the Teen Success program (Collaboration with Regional Grants)</i>	

<b>Population: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>PUBLIC HEALTH INSTITUTE</b> Oakland, CA <i>For general operating support of the Public Health Institute's Pharmacy Access Partnership</i>	425,000
<b>PUBLIC POLICY INSTITUTE OF CALIFORNIA</b> San Francisco, CA <i>For a survey series dedicated to gauging public attitudes on the state's education system, environmental condition, and rapid population growth (Collaboration with Environment and Education)</i>	75,000
<b>REPRODUCTIVE HEALTH TECHNOLOGIES PROJECT</b> Washington, DC <i>For general support</i>	375,000
<b>SEXUALITY INFORMATION AND EDUCATION COUNCIL OF THE UNITED STATES</b> New York, NY <i>For leadership and management skills development (Collaboration with Philanthropy)</i>	
<b>UNIVERSITY OF CALIFORNIA AT SAN FRANCISCO</b> San Francisco, CA <i>For the Young Women's REACH Project at the New Generation Health Center (Collaboration with Regional Grants)</i>	
<b>UNIVERSITY OF CALIFORNIA AT SAN FRANCISCO, DEPARTMENT OF OBSTETRICS, GYNECOLOGY AND REPRODUCTIVE SCIENCES</b> San Francisco, CA <i>For general support of the Center for Reproductive Health Research and Policy</i>	1,000,000
<b>UNIVERSITY OF SOUTHERN CALIFORNIA</b> Los Angeles, CA <i>For a series of impartial, nonpartisan analyses of four ballot initiatives facing California voters in the November 2005 special election (Collaboration with Special Projects and Education)</i>	50,000

## *Funding and Policies*

<b>AFRICAN ECONOMIC RESEARCH CONSORTIUM</b> Nairobi, Kenya <i>For general operating support for AERC's Population Dynamics and Poverty Reduction in Africa research program</i>	1,000,000
<b>AFRICAN POPULATION AND HEALTH RESEARCH CENTRE</b> Nairobi, Kenya <i>For general operating support (Collaboration with Education)</i>	534,000
<b>AFRICAN POPULATION AND HEALTH RESEARCH CENTRE</b> Nairobi, Kenya <i>For a research project on linkages between HIV/AIDS programs and the reproductive health services in sub-Saharan Africa</i>	25,000

<b>Population: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>AFRICAN VIRTUAL UNIVERSITY</b> Nairobi, Kenya <i>For a program entitled "Bandwidth Consolidation for Partnership Universities" sponsored by the Partnership for Higher Education in Africa (Collaboration with Special Projects, Education, and Global Development)</i>	100,000
<b>AMERICAN MEDICAL WOMEN'S ASSOCIATION</b> Alexandria, VA <i>For the Reproductive Health Initiative</i>	100,000
<b>AUSTRALIAN REPRODUCTIVE HEALTH ALLIANCE</b> Deakin West, Australia <i>For general support            For a project to improve ARHA's governance and development strategies (Collaboration with Philanthropy)</i>	350,000
<b>BROOKINGS INSTITUTION, GLOBAL ECONOMY AND DEVELOPMENT CENTER</b> Washington, DC <i>For research projects that address the interface between poverty and demographics</i>	200,000
<b>CENTER FOR GLOBAL DEVELOPMENT</b> Washington, DC <i>For the preparation of a one-day meeting on population, economic development, and reproductive health</i>	90,000
<b>CENTER FOR HEALTH AND GENDER EQUITY</b> Takoma Park, MD <i>For general support</i>	300,000
<b>COALITION FOR WOMEN'S ECONOMIC DEVELOPMENT AND GLOBAL EQUALITY</b> Washington, DC <i>For general operating support</i>	155,000
<b>COMMONWEALTH MEDICAL TRUST</b> London, United Kingdom <i>For general support</i>	30,000
<b>COUNCIL ON FOREIGN RELATIONS</b> Washington, DC <i>For general support of the Council on Foreign Relations' Center for Universal Education (Collaboration with Education and Global Development)</i>	250,000
<b>EQUILIBRES &amp; POPULATIONS</b> Paris, France <i>For the preparation of a three-day research workshop on population and reproductive health impacts on economic development</i>	175,000
<b>FUNDERS NETWORK ON POPULATION REPRODUCTIVE HEALTH AND RIGHTS</b> Rockville, MD <i>For support for an organizational assessment (Collaboration with Philanthropy)</i>	
<b>FUTURES GROUP</b> Washington, DC <i>For a study on the micro-economic impact of abortion-related morbidity and mortality</i>	25,000

<b>Population: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>GEORGE WASHINGTON UNIVERSITY, CENTER FOR GLOBAL HEALTH</b> Washington, DC <i>For general operating support for the George Washington University Center for Global Health's program of research on population and poverty</i>	200,000
<b>GLOBAL CAMPAIGN FOR EDUCATION</b> Brussels, Belgium <i>For general support (Collaboration with Education and Global Development)</i>	50,000
<b>HARVARD UNIVERSITY, SCHOOL OF PUBLIC HEALTH</b> Cambridge, MA <i>For general operating support of the Harvard University Department of Population and International Health's research program on the impact of reproductive health and population dynamics on economic development</i>	400,000
<b>INDEPTH NETWORK</b> Accra, Ghana <i>For planning a potential partnership that would match analytic and training skills and opportunities among INDEPTH Network's demographic surveillance sites and university population training centers in Ghana, Kenya, and South Africa</i>	100,000
<b>INTERNATIONAL CENTER FOR RESEARCH ON WOMEN</b> Washington, DC <i>For general support</i>	300,000
<b>INTERNATIONAL INSTITUTE FOR APPLIED SYSTEMS ANALYSIS</b> Laxenburg, Austria <i>For a project to assess population science and training capacities in African academic institutions</i>	130,000
<b>INTERNATIONAL UNION FOR THE SCIENTIFIC STUDY OF POPULATION</b> Paris, France <i>For general support</i>	300,000
<b>JAPANESE ORGANIZATION FOR INTERNATIONAL COOPERATION IN FAMILY PLANNING</b> Tokyo, Japan <i>For general support</i>	300,000
<b>NATIONAL ACADEMY OF SCIENCES</b> Washington, DC <i>For general operating support of the National Academy of Sciences Committee on Population</i>	100,000
<b>POPULATION ASSOCIATION OF AMERICA</b> Silver Spring, MD <i>For general operating support</i>	30,000
<b>POPULATION COUNCIL</b> New York, NY <i>For a strategic planning process (Collaboration with Philanthropy) For general support</i>	3,000,000

<b>Population: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>POPULATION REFERENCE BUREAU</b>	
Washington, DC	
<i>For general support</i>	1,000,000
<i>For general operating support of its Centers of Research Excellence in Population, Reproductive Health and Economic Development</i>	1,000,000
<i>For general operating support of PRB's Dissertation Fellowship in Population, Reproductive Health and Economic Development program</i>	400,000
<i>For development of dissemination and marketing strategies (Collaboration with Philanthropy)</i>	
<b>PRINCETON UNIVERSITY, OFFICE OF POPULATION RESEARCH</b>	
Princeton, NJ	
<i>For a study examining trends in levels of sexual activity in Africa</i>	60,000
<b>TIDES CENTER</b>	
Washington, DC	
<i>For general operating support for the African Grantmakers' Affinity Group</i>	60,000
<b>UNION FOR AFRICAN POPULATION STUDIES</b>	
Dakar-Ponty, Sénégal	
<i>For general operating support</i>	125,000
<b>UNION OF CONCERNED SCIENTISTS</b>	
Cambridge, MA	
<i>For the Restoring Scientific Integrity project (Collaboration with Environment)</i>	150,000
<b>UNITED NATIONS ASSOCIATION OF THE UNITED STATES</b>	
New York, NY	
<i>For the Women and the Millennium Development Goals: The Five-Year Review and Moving Forward project</i>	50,000
<b>UNITED NATIONS FOUNDATION</b>	
Washington, DC	
<i>For general support for regions affected by the December 2004 tsunami (Collaboration with Special Projects)</i>	50,000
<b>UNIVERSITY OF CALIFORNIA AT LOS ANGELES</b>	
Los Angeles, CA	
<i>For general support of the University of California at Los Angeles' Training in International Population Studies program</i>	100,000
<b>UNIVERSITY OF CAPE COAST</b>	
Cape Coast, Ghana	
<i>For the University of Cape Coast's graduate training program in population studies</i>	100,000
<b>UNIVERSITY OF CAPE TOWN</b>	
Cape Town, South Africa	
<i>For general support of the Centre of Actuarial Research's (CARE) population science training program</i>	500,000
<b>UNIVERSITY OF COLORADO, INSTITUTE OF BEHAVIORAL SCIENCE</b>	
Boulder, CO	
<i>For general operating support of the University of Colorado's African Population Studies Research and Training Program</i>	400,000

<b>Population: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>UNIVERSITY OF GHANA</b> Legon, Ghana <i>For support for the University of Ghana's training of population studies scholars</i>	110,000
<b>UNIVERSITY OF MICHIGAN</b> Ann Arbor, MI <i>For general support of the University of Michigan's Professional Exchange for Applied Knowledge (PEAK) Initiative</i>	150,000
<b>UNIVERSITY OF NAIROBI, POPULATION STUDIES AND RESEARCH INSTITUTE</b> Nairobi, Kenya <i>For general operating support of the University of Nairobi's Population Studies and Research Institute training program</i>	50,000
<b>UNIVERSITY OF SOUTHERN CALIFORNIA, COLLEGE OF LETTERS, ARTS AND SCIENCES</b> Los Angeles, CA <i>For a research project entitled "The Craft of Think-Tank Institution Building" (Collaboration with Global Development)</i>	25,000
<b>UNIVERSITY OF THE WITWATERSRAND, SCHOOL OF PUBLIC HEALTH</b> Johannesburg, South Africa <i>For general operating support for University of the Witwatersrand's Population Program</i>	420,000
<b>WORLD BANK</b> Washington, DC <i>For support for youth reproductive health and demographic change issues in the World Bank's World Development Report 2007: Development and the Next Generation</i> <i>For general operating support of a World Bank research program on how reproductive health and demographic shifts impact socioeconomic outcomes, economic growth, income distribution, and the incidence of poverty in developing countries</i>	200,000 1,500,000

## *Improving Access*

### **CENTRE FOR DEVELOPMENT AND POPULATION ACTIVITIES**

Washington, DC

*For an organizational effectiveness grant to develop new marketing materials  
(Collaboration with Philanthropy)*

### **DKT INTERNATIONAL**

Washington, DC

*For general operating support* 875,000

### **DOCTORS WITHOUT BORDERS**

New York, NY

*For programs to address sexual violence* 200,000

### **FAMILY CARE INTERNATIONAL**

New York, NY

*For general support* 250,000

*For general operating support of Family Care International's International  
Consortium for Emergency Contraception program* 150,000

### **FAMILY HEALTH INTERNATIONAL**

Research Triangle Park, NC

*For general operating support of the Institute for Family Health program* 760,000

<b>Population: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>GLOBAL AIDS ALLIANCE</b> Washington, DC <i>For general operating support</i>	150,000
<b>GYNUITY HEALTH PROJECTS</b> New York, NY <i>For a project to introduce and expand reproductive health technologies</i>	500,000
<b>IBIS REPRODUCTIVE HEALTH</b> Cambridge, MA <i>For general operating support</i>	250,000
<b>INTERNATIONAL COMMUNITY OF WOMEN LIVING WITH HIV/AIDS</b> London, United Kingdom <i>For general support</i>	200,000
<b>INTERNATIONAL HIV/AIDS ALLIANCE</b> Brighton, United Kingdom <i>For general operating support</i>	450,000
<b>INTERNATIONAL PLANNED PARENTHOOD FEDERATION</b> London, United Kingdom <i>For general support for regions affected by the December 2004 tsunami (Collaboration with Special Projects)</i> <i>For efforts to strengthen the linkages between HIV/AIDS and reproductive health programs</i>	150,000 375,000
<b>INTERNATIONAL RESCUE COMMITTEE</b> New York, NY <i>For general operating support of the International Rescue Committee's Women's Commission for Refugee Women &amp; Children program</i>	600,000
<b>IPAS</b> Chapel Hill, NC <i>For general operating support</i> <i>For advocacy projects in Ethiopia</i>	3,500,000 200,000
<b>JOHNS HOPKINS UNIVERSITY, THE BILL AND MELINDA GATES INSTITUTE FOR POPULATION AND REPRODUCTIVE HEALTH</b> Baltimore, MD <i>For the Voluntary HIV Testing and Counseling Integrated Contraceptive Services Study</i>	250,000
<b>OXFAM GB</b> Cowley, United Kingdom <i>For a situational analysis of reproductive health and HIV/AIDS in two African countries</i>	75,000
<b>PATH</b> Seattle, WA <i>For general support of PATH's Reproductive Health Strategic Program</i>	925,000
<b>PATHFINDER INTERNATIONAL</b> Watertown, MA <i>For general support</i>	1,200,000

<b>Population: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>PLANNED PARENTHOOD FEDERATION OF AMERICA</b> New York, NY <i>For advocacy work in Kenya</i>	200,000
<b>POPULATION COMMUNICATIONS INTERNATIONAL</b> New York, NY <i>For general support</i>	200,000
<b>POPULATION COUNCIL</b> New York, NY <i>For emergency contraception programs in Africa</i>	250,000
<b>REPRODUCTIVE HEALTH RESEARCH UNIT</b> Durban, South Africa <i>For general support</i>	600,000
<b>SAVE THE CHILDREN</b> Westport, CT <i>For reproductive health activities</i>	200,000
<b>UNIVERSITY OF TORONTO, FACULTY OF LAW</b> Toronto, Canada <i>For general support of the University of Toronto's International Reproductive and Sexual Health Law Programme</i>	450,000
<b>WORLD HEALTH ORGANIZATION</b> Geneva, Switzerland <i>For the Special Programme of Research, Development and Research Training in Human Reproduction</i>	550,000
<b>WORLD NEIGHBORS</b> Oklahoma City, OK <i>For general support</i>	350,000

### *Special Opportunities*

<b>FACING THE FUTURE: PEOPLE AND THE PLANET</b> Seattle, WA <i>For general support</i>	25,000
<b>PARTNERS IN POPULATION AND DEVELOPMENT</b> Dhaka, Bangladesh <i>For support of Partners in Population and Development's annual International Forum</i>	75,000
<b>PLANNED PARENTHOOD FEDERATION OF AMERICA</b> New York, NY <i>For general operating support for regions affected by Hurricane Katrina</i>	1,000,000

# Regional Grants

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The Regional Grants Program supports organizations that improve the lives of disadvantaged people in the San Francisco Bay Area. The Program has pursued this goal by providing operating support to promising nonprofits engaged in direct service, often coupling that support with staff assistance and organizational effectiveness funding. In 2005, the Regional Grants Program supported organizations concerned with youth, employment, family planning, and improving the quality of life in the Bay Area's low-income neighborhoods.

Because the Regional Grants Program funds programs across a range of issues, grants are typically made in close collaboration with other Hewlett Foundation Programs or with foundations that have on-the-ground expertise in the Bay Area.

**In 2005, the Regional Grants Program made grants totaling \$8,027,710.**

## Youth

*Background.* High school dropout rates in the disadvantaged neighborhoods of East Palo Alto, Richmond, and San Jose hover between 60 and 70 percent. Many youth leave school to take low-paying jobs that will not lead them out of poverty. For foster youth, incarceration or homelessness is more common than graduation from high school.

*K-12 education.* In 2005, the Regional Grants Program collaborated with the Education Program to support improvements in classroom instruction in East Palo Alto through a grant to the New Teacher Center and the expansion of access to higher education in the Central Valley through support for the University of California, Merced. A grant to Resource Area for Teachers, which creates innovative hands-on learning materials using surplus industrial products that would otherwise become waste, increased its capacity to supply schools serving economically disadvantaged students.

*Disadvantaged youth.* In collaboration with the Youth Transition Funders Group, the Program supported a local partnership of the United Way Silicon Valley and People Acting in Community Together to identify and re-enroll out-of-school youth in San Jose. Together with the Skoll Foundation, the Program also supported Businesses United in Investing, Lending, and Development (BUILD) in the expansion of its programs to Oakland. To date, the organiza-

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*Program  
Guidelines*

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*Program  
Report*



### Supporting Foster Youth: California Connected by 25 Initiative

*Foster youth face significant obstacles to success when they turn eighteen. Fewer than 2 percent graduate from college and as many as 50 percent of the homeless spent time in the foster care system. In 2005, the Foundation provided a grant to the California Connected by 25 Initiative to help public child welfare agencies and their community partners improve the lives of foster youth in Alameda, Fresno, San Francisco, Santa Clara, and Stanislaus counties. Along with the Hewlett Foundation, four other foundations made grants to the Initiative that the counties are matching with their own investment. This public-private partnership has resulted in a new low-cost model of transitional housing, additional educational support services designed to improve high school graduation rates, and partnerships with local Workforce Investment Boards and community colleges to create pathways to college and successful careers by age twenty-five.*

tion has had astonishing success getting participants admitted to colleges and universities.

*Foster youth.* Foster youth are among the most at-risk populations in the region, and there are a number of promising efforts under way to improve their prospects. Last year, the Hewlett Foundation collaborated with the Schwab and Irvine Foundations to create housing for youth aging out of the foster system.

### *Employment*

Barriers to good jobs relegate many Bay Area workers to poverty. A combination of factors, including a lack of basic job skills, limited English proficiency, substance abuse, homelessness, and disabilities, contributes to low wages. The high cost of living in the region further compounds the problem. Last year, the Program made a large grant to REDF, a national leader in helping organizations that provide job training to disadvantaged populations. REDF supports social enterprises that employ hundreds of Bay Area workers. In 2005, the Program also provided assistance on planning and evaluation to the Bay Area Workforce Funding Collaborative, a partnership of foundations that has secured private and public funding to create job opportunities for the working poor in the growing health and biotechnology professions.

### *Reproductive Health*

Unintended pregnancy is endemic in low-income communities throughout the Bay Area. In collaboration with the Population Program, grants were made in 2005 to offer expanded outreach services to sexually active, low-income teens, and to evaluate the effectiveness of these efforts. The first was to the New Generation Health Center in San Francisco and the second was to Planned Parenthood Mar Monte's Teen Success Program. In 2006, the Program plans to collaborate with the Population Program to focus on teen pregnancy prevention among vulnerable Latino youth.

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### *Community, Environment, and the Arts*

The elements that turn a physical place into a community and a home—parks, playgrounds, community centers, and the performing arts—are absent, limited, or run-down in most low-income neighborhoods. The Regional Grants Program made a series of grants to improve the quality of life in Bay Area low-income communities. A \$1 million endowment grant helped the new YMCA in East Palo Alto break ground in September 2005. In collaboration with the Performing Arts Program, a grant to the East Bay Center for the Performing Arts will enable the organization to create a permanent home for its programs by acquiring and renovating a historic building. The East Bay Center is the primary artistic and cultural resource in the city of Richmond and serves more than 15,000 people annually. Finally, the Regional Grants and Environment Programs awarded a grant to the Trust for Public Land that helped build and restore parks in low-income urban neighborhoods in the Bay Area.

### *Neighborhood Improvement Initiative*

The Hewlett Foundation's Neighborhood Improvement Initiative (NII) was created to improve the physical, social, and economic conditions in low-income neighborhoods in the Bay Area. Active resident involvement in community planning and decisionmaking processes is a central tenet of the NII, in combination with a comprehensive, coordinated, multiyear strategy to address poverty. The NII is structured to accomplish six key goals:

- Connect fragmented efforts to address poverty-related issues
- Improve the capacity of participating community-based organizations
- Improve Bay Area community foundations' capacity to support neighborhood improvement strategies
- Increase resident involvement in neighborhood planning and improvement
- Leverage significant public and private resources
- Provide long-term statistical evidence of changes in poverty indicators

December 2006 will mark the end of the Neighborhood Improvement Initiative, after more than ten years of investment in

three disadvantaged neighborhoods in the Bay Area. The NII made its final investment in the West Oakland site in 2005, with a grant to the San Francisco Foundation for support of health and other services at McClymonds High School. The final investment in the Mayfair Improvement Initiative in East San Jose was made in 2004. The following section details program investments in the remaining East Palo Alto site.

### *Strengthening the Community of East Palo Alto*

East Palo Alto is one of the poorest communities in the Bay Area and home to one of the lowest-performing school districts in the state. Existing service organizations suffer from inadequate resources, lack of capacity, and poor coordination. In addition, East Palo Alto residents and institutions are disconnected from networks and opportunities that improve resources and wages.

As a result of a Hewlett Foundation–sponsored planning process involving 300 East Palo Alto residents, One East Palo Alto was established in 1999 as a community intermediary organization to coordinate the services of other organizations, advocate for local policy reforms, and organize residents to get involved in the community. One East Palo Alto makes recommendations to the Hewlett Foundation about the NII’s funding priorities in the city and implements strategies in three programs: the Learn Program, which is focused on improving child literacy; the Safe Program, which helps increase residents’ feeling of safety in the neighborhood; and the Earn Program, which aims to increase economic security for local families.

### *Improving Child Literacy: the Learn Program*

*Background.* The child literacy crisis in the Ravenswood City School District is alarming. Ninety-five percent of the children in the Program’s two target schools are below a proficient level. NII and Education Program staff members have collaborated for three years to develop leadership, management structures, staff development, and services to address this problem.

*2005 progress.* Five NII grants were made in 2005 to expand the capacity of after-school programs designed to increase reading literacy in two Ravenswood schools. With guidance from the New Teacher Center, a Hewlett Foundation grantee, the district over-

hauled its after-school programs, completing the design of its referral and client-tracking operations, hiring credentialed teachers for academic programs, and establishing a digital media program for middle school students. As essential players in improving child achievement, parents became more involved with their children's education and improved their own English language literacy in two target schools. A grant to Nuestra Casa enabled it to improve 153 parents' skills in English language, parenting, and leadership.<sup>1</sup> The East Palo Alto Public Library's Quest Learning Center tutored children after school in reading, resulting in improved literacy for forty-eight children.

*Plans and goals for 2006.* The Program plans to continue support for One East Palo Alto's coordination of after-school programs and support for four after-school providers at Cesar Chavez Elementary. The Program also plans to provide coaching by the New Teacher Center for after-school program staff, ongoing funding for Nuestra Casa to train and organize new immigrant parents, and support for the East Palo Alto Public Library to tutor children in reading after school.

### *Improving Neighborhood Safety: the Safe Program*

*Background.* Being disconnected from school and work is the norm for East Palo Alto youth—65 percent drop out of high school, and of these dropouts, 100 percent of African-American males and 33 percent of Latino males are unemployed. Idle youth are at risk of becoming involved in drug abuse and crime.

*2005 progress.* In 2004, One East Palo Alto launched a Crime Reduction Task Force composed of public agencies, elected representatives, and community organizations. At a press conference the following year, young community members expressed concern about unemployment, safety, and a lack of recreational facilities. In response, One East Palo Alto spearheaded a community-



### Helping Students, Parents, and Teachers in East Palo Alto

*In 2005, the Foundation supported several organizations working to strengthen educational opportunities in East Palo Alto, including the New Teacher Center. The mentoring provided by the New Teacher Center has led to a stunning turnaround at several schools in the city's Ravenswood School District: 84 percent of new teachers returned to the classroom in 2004–05, compared with only 27 percent the previous year, and students' scores on standardized tests improved. A grant to Nuestra Casa supports English language classes for parents in East Palo Alto that have helped them increase their level of English proficiency and become more involved in their children's academic work. Finally, a grant to the Quest Learning Center at the East Palo Alto Public Library will help provide tutoring, homework assistance, and skill building after school for 100 students in the city.*

wide effort to find jobs and/or subsidized sponsored employment for youth. By July 2005, One East Palo Alto had convened a large cross section of youth-serving providers<sup>2</sup>, raised funding, found two host agencies to anchor the service delivery, and placed thirty East Palo Alto youth in summer employment in more than twenty nonprofits in the community. A Hewlett Foundation grant to Opportunities Industrialization Center West supported the training, placement, and stipends for youth to participate in the program.

*Plans and goals for 2006.* The Program will continue its support for One East Palo Alto to organize the summer employment program with its youth-serving partners, and to convene the Crime Reduction Task Force in 2006. Foundation funding will also enable One East Palo Alto to conduct planning and provide technical assistance and resource development to organizations serving East Palo Alto youth who have dropped out of high school and are unemployed.

*Improving Economic Self-Sufficiency: the Earn Program*

*Background.* East Palo Alto residents have the lowest income levels in the county, with a per capita income of approximately \$13,775. About 43 percent of residents live in poverty;<sup>3</sup> of these, 56 percent are working.

*2005 progress.* Four grantees worked to increase economic self-sufficiency: two projects helped residents get better jobs, and two helped residents build their assets through saving, smart money management, or starting a business. Seventy residents in Opportunities Industrialization Center West's training programs increased their income by approximately five dollars an hour after completing training and landing new jobs. The San Mateo County Human Services Agency's Gateway pilot trained seventeen people in the first half of 2005 in reading and math to prepare them for biotechnology training and job placement at Genentech.

*Plans and goals for 2006.* The Earn Program will be folded into One East Palo Alto's larger economic self-sufficiency strategy focusing on the needs of disconnected youth. One East Palo Alto plans to continue the summer sponsored employment program and to support additional employment projects.

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*Notes*

<sup>1</sup> As an indication of the literacy level of the parents involved in the training, and consistent with the new Latino immigrant population in East Palo Alto, 55 percent have less than an eighth grade education, and another 22 percent have not completed high school. Of the 20 percent who did not respond to the question of education level, the project staff believe that the majority also have less than an eighth grade education.

<sup>2</sup> The youth service providers are: the Sequoia Union High School District, East Palo Alto YMCA, College Track, OICW, New Perspectives, Shule Mandela Academy, Free At Last, City of East Palo Alto, Youth Community Service, El Concilio, East Palo Alto Digital Village, Community Development Institute, and Pacific Islander Community Center.

<sup>3</sup> This figure is based on 200 percent of poverty thresholds used by the federal government. In 1999, the poverty threshold for a household with two children and one adult was \$13,423.

<b>Regional Grants: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>BRIDGESPAN GROUP</b> Boston, MA <i>For development of a pilot plan for “Communities of Opportunity”</i>	\$50,000
<b>BUSINESSES UNITED IN INVESTING, LENDING AND DEVELOPMENT</b> Menlo Park, CA <i>For general support</i>	500,000
<b>CHRONICLE SEASON OF SHARING FUND</b> San Francisco, CA <i>For general support</i>	50,000
<b>COALITION OF COMMUNITY FOUNDATIONS FOR YOUTH</b> Basehor, KS <i>For general support of the Youth Transition Funders Group</i>	50,000
<b>COMMUNITY FOUNDATION SILICON VALLEY</b> San Jose, CA <i>For the Palo Alto Weekly Holiday Fund</i>	50,000
<b>EAST BAY CENTER FOR THE PERFORMING ARTS</b> Richmond, CA <i>For the Winters Building Revitalization Project (Collaboration with Special Projects and Performing Arts)</i>	500,000
<b>PENINSULA COMMUNITY FOUNDATION</b> San Mateo, CA <i>For the 2005–2006 Holiday Fund</i>	25,000
<b>PEOPLE ACTING IN COMMUNITY TOGETHER</b> San Jose, CA <i>For outreach, education, and community organizing activities for the Greater San Jose Alternative Education Collaborative (AEC)</i>	50,000
<b>PLANNED PARENTHOOD MAR MONTE</b> San Jose, CA <i>For support of the Teen Success program (Collaboration with Population)</i>	400,000
<b>RESOURCE AREA FOR TEACHERS</b> San Jose, CA <i>For general support (Collaboration with Education)</i>	200,000
<b>SAN FRANCISCO FOUNDATION</b> San Francisco, CA <i>For the Bay Area Workforce Funding Collaborative</i>	400,000
<b>SAN FRANCISCO FOUNDATION COMMUNITY INITIATIVE FUNDS</b> San Francisco, CA <i>For the California Connected by 25 Initiative</i>	900,000
<b>SAN JOSE MERCURY NEWS WISH BOOK FUND</b> San Jose, CA <i>For general support</i>	20,000
<b>SECOND HARVEST FOOD BANK</b> San Jose, CA <i>For general support of the Food Assistance program</i>	25,000

<b>Regional Grants: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>SRI INTERNATIONAL</b> Menlo Park, CA <i>For a study of arts education in California            (Collaboration with Education and Performing Arts)</i>	139,500
<b>TRUST FOR PUBLIC LAND</b> San Francisco, CA <i>For general support of the San Francisco Bay Area Community Parks and            Playgrounds Program            (Collaboration with Environment)</i>	500,000
<b>UNITED WAY SILICON VALLEY</b> San Jose, CA <i>For project management and capacity building for the Greater San Jose Alternative            Education Collaborative (AEC)</i>	225,000
<b>UNIVERSITY OF CALIFORNIA AT BERKELEY</b> Berkeley, CA <i>For the Young Musicians Program for program enhancements and organizational            infrastructure development            (Collaboration with Performing Arts)</i>	300,000
<b>UNIVERSITY OF CALIFORNIA AT MERCED</b> Merced, CA <i>For improving outreach and support services to disadvantaged transfer students of            the Central Valley to attend UC Merced (Collaboration with Education)</i>	200,000
<b>UNIVERSITY OF CALIFORNIA AT SAN FRANCISCO</b> San Francisco, CA <i>For the Young Women's REACH Project at the New Generation Health Center            (Collaboration with Population)</i>	700,000
 <b>Neighborhood Improvement Initiative</b>  	
<b>COMMUNITY DEVELOPMENT INSTITUTE</b> East Palo Alto, CA <i>For support of Nuestra Casa's parent English literacy and leadership development in            East Palo Alto</i>	80,000
<b>EAST PALO ALTO MICRO BUSINESS INITIATIVE</b> East Palo Alto, CA <i>For financial literacy and small business development training for East Palo Alto            residents</i>	50,000
<b>HUMAN SERVICES AGENCY OF SAN MATEO COUNTY</b> Belmont, CA <i>For support of a community college training program for EPA residents in basic skills,            technical skills, and on-the-job training leading to job placement in the health field</i>	75,000
<b>LENDERS FOR COMMUNITY DEVELOPMENT</b> San Jose, CA <i>For case management of East Palo Alto clients enrolled in the Individual Development            Account program</i>	20,000

<b>Regional Grants: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>ONE EAST PALO ALTO NEIGHBORHOOD IMPROVEMENT INITIATIVE</b> East Palo Alto, CA <i>For the One East Palo Alto Neighborhood Improvement Initiative</i>	521,210
<b>OPPORTUNITIES INDUSTRIALIZATION CENTER WEST</b> Menlo Park, CA <i>For job training and placement programs for East Palo Alto residents</i> <i>For a summer youth employment program and job training scholarships for EPA residents</i>	45,000 110,000
<b>RAVENSWOOD CITY SCHOOL DISTRICT</b> East Palo Alto, CA <i>For support of the Ravenswood City School District after-school programs</i>	124,000
<b>RAVENSWOOD CITY SCHOOL DISTRICT, DEPARTMENT OF TECHNOLOGY</b> East Palo Alto, CA <i>For the creation of a digital media production after-school program for middle school students in East Palo Alto</i>	65,000
<b>SAN FRANCISCO FOUNDATION</b> San Francisco, CA <i>For general support of the West Oakland Initiative</i>	853,000
<b>SAN MATEO COUNTY LIBRARY JOINT POWERS AUTHORITY</b> San Mateo, CA <i>For the Quest Learning Center's after-school program for East Palo Alto children</i> <i>For the Quest Learning Center's literacy after-school program for East Palo Alto children</i>	200,000 75,000
<b>UNIVERSITY OF CALIFORNIA AT SANTA CRUZ, NEW TEACHER CENTER</b> Santa Cruz, CA <i>For renewal of support for the New Teacher Center's work in the Ravenswood School District (Collaboration with Education)</i>	525,000

# *Special Projects*

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**a**lthough most grantmaking takes place in the particular Programs, the Hewlett Foundation values being able to respond flexibly to unanticipated problems and opportunities. Thus, in certain circumstances, the Foundation supports special projects that do not fall within the guidelines of a particular Program.

On occasion, when existing Program budgets cannot fully support an important effort, supplemental funds will be provided from Special Projects. During 2005, for example, Special Projects funds contributed to grants to the African Virtual University (with the Education, Population, and Global Development Programs), the East Bay Center for the Performing Arts (with the Performing Arts and Regional Grants Programs), Menlo School (with the Performing Arts Program for general support for Music@Menlo), and Oxfam Great Britain (with the Global Development Program). Special Projects joined with the Population Program to make grants to the International Planned Parenthood Federation and the United Nations Foundation to assist regions affected by the December 2004 tsunami in Southeast Asia. In the wake of Hurricane Katrina in 2005, Special Projects also made a grant to the Planned Parenthood Federation of America to support health services for residents of the Gulf Coast.

Special Projects also makes extraordinary grants to institutions that play important state, national, or international roles but are not within the guidelines of particular Programs. During 2005, this included grants to the American Academy of Arts and Sciences, the Carnegie Endowment for International Peace, the Center for Advanced Study in the Behavioral Sciences, the Public Policy Institute of California, the Stanford Institute for Economic and Policy Research, and the University of California, Berkeley (for the renovation of the Roger Heyns Reading Room at the Bancroft Library and for International House). By the same token, Special Projects supported some key institutions concerned with international affairs, including Security Council Report, Human Rights Watch, and the International Crisis Group. It also supported Yale University's leadership training program for Chinese governmental officials, and a conference on preventive force convened by Stanford University.

In 2005, the Hewlett Foundation began exploring a “common values” agenda to determine how the Foundation might help reduce the polarization that seems to be endemic to contemporary political and social discourse, and increase evidence-based argument and deliberation in public policymaking. Under this rubric, the Foundation supported efforts to address polarization in California politics: It made grants to the California Voter Foundation and the Commonwealth Club of California for voter education, and for the public television program *California Connected*, to examine the changes that are transforming the state.

Five years ago, Special Projects supported a research project by Princeton University professors Daniel Kahneman, Alan Krueger, and their colleagues for the measurement of people’s well-being. Among other things, the research validated what is known as the “day reconstruction method” as a way to efficiently collect information on how individuals perceive the activities of their daily life.<sup>1</sup> In 2005, Special Projects made a follow-on grant toward developing National Well-Being Accounts, with the ultimate goal of supplementing purely economic metrics, such as Gross Domestic Product, with measures that provide a broader sense of residents’ well-being.

In addition to continuing to be alert to unanticipated opportunities, the Foundation hopes to deepen and broaden the common values agenda in 2006.

**In 2005, Special Projects made grants totaling \$13,811,158.**

*Note*

<sup>1</sup> The researchers published this finding in the December 3, 2004, issue of the journal *Science*.

<b>Special Projects: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>AFRICAN VIRTUAL UNIVERSITY</b> Nairobi, Kenya <i>For a program entitled "Bandwidth Consolidation for Partnership Universities" sponsored by the Partnership for Higher Education in Africa (Collaboration with Education, Population, and Global Development)</i>	\$100,000
<b>ALVARALICE FOUNDATION</b> New York, NY <i>For the International Symposium on Restorative Justice and Peace in Colombia</i>	50,000
<b>AMERICAN ACADEMY OF ARTS AND SCIENCES</b> Cambridge, MA <i>For a capital campaign</i>	3,000,000
<b>BOSTON REVIEW</b> Cambridge, MA <i>For publication of a special issue of Boston Review</i>	30,000
<b>CALIFORNIA VOTER FOUNDATION</b> Davis, CA <i>For the Election House Parties project</i>	20,000
<b>CALSTART</b> Pasadena, CA <i>For the California Transportation Energy Security Initiative (Collaboration with Environment)</i>	100,000
<b>CARNEGIE ENDOWMENT FOR INTERNATIONAL PEACE</b> Washington, DC <i>For general support of CEIP's China program</i>	1,000,000
<b>CENTER FOR ADVANCED STUDY IN THE BEHAVIORAL SCIENCES</b> Stanford, CA <i>For a planning grant</i>	150,000
<b>COLUMBIA UNIVERSITY, SCHOOL OF INTERNATIONAL AND PUBLIC AFFAIRS</b> New York, NY <i>For the Security Council Report</i>	750,000
<b>COMMONWEALTH CLUB OF CALIFORNIA</b> San Francisco, CA <i>For the Voices of Reform Project</i>	34,440
<b>EAST BAY CENTER FOR THE PERFORMING ARTS</b> Richmond, CA <i>For the Winters Building Revitalization Project (Collaboration with Performing Arts and Regional Grants)</i>	500,000
<b>GREAT VALLEY CENTER</b> Modesto, CA <i>For general support</i>	500,000
<b>GREEN MEDIA TOOLSHED</b> Washington, DC <i>For general support</i>	100,000

<b>Special Projects: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>HUMAN RIGHTS WATCH</b> New York, NY <i>For general support</i>	200,000
<b>INTERNATIONAL CRISIS GROUP</b> Washington, DC <i>For general support</i>	250,000
<b>INTERNATIONAL HOUSE</b> Berkeley, CA <i>For general support</i>	250,000
<b>INTERNATIONAL PLANNED PARENTHOOD FEDERATION</b> London, United Kingdom <i>For general support for regions affected by the December 2004 tsunami (Collaboration with Population)</i>	750,000
<b>KCET</b> Los Angeles, CA <i>For California Connected, a collaborative public television series produced by KCET, KPBS, KQED, and KVIE on the changes that are transforming California</i>	1,000,000
<b>MENLO SCHOOL</b> Atherton, CA <i>For general support of Menlo School's Music@Menlo program (Collaboration with Performing Arts)</i>	
<b>MONTEREY BAY AQUARIUM</b> Monterey, CA <i>For a grant to the Aquarium's 20th Anniversary Fund in Steve Neal's honor</i>	100,000
<b>NEW SCHOOL UNIVERSITY, GRADUATE FACULTY OF POLITICAL &amp; SOCIAL SCIENCE</b> New York, NY <i>For a conference focusing on issues with the environment, health, and energy (Collaboration with Environment and Population)</i>	25,000
<b>OXFAM GB</b> Cowley, United Kingdom <i>For general support of the Make Trade Fair campaign (Collaboration with Global Development)</i>	500,000
<b>PEACEWORKS FOUNDATION</b> New York, NY <i>For the OneVoice initiative</i>	50,000
<b>POLICYLINK</b> Oakland, CA <i>For the planning process for a long-term statewide effort to promote fiscal and governance reform in California (Collaboration with Education)</i>	30,000
<b>PRINCETON UNIVERSITY, WOODROW WILSON SCHOOL OF PUBLIC AND INTERNATIONAL AFFAIRS</b> Princeton, NJ <i>For development, pre-testing, and validation of a module for the American Time Use Survey and to collect initial data for a nationally representative sample</i>	400,000

<b>Special Projects: Organizations (by Category)</b>	<b>Grants Authorized 2005</b>
<b>PUBLIC POLICY INSTITUTE OF CALIFORNIA</b> San Francisco, CA <i>For outreach related to the California 2025 project</i>	200,000
<b>QUEST SCHOLARS PROGRAM</b> Stanford, CA <i>For general support</i>	200,000
<b>RESOURCES LEGACY FUND</b> Sacramento, CA <i>For a planning grant for a statewide effort to promote fiscal reform in California (Collaboration with Education)</i>	30,000
<b>SAN FRANCISCO FOUNDATION</b> San Francisco, CA <i>For providing support to grassroots organizations in California focusing on activities to increase transparency about the state budget and to mobilize for reform (Collaboration with Education)</i>	100,000
<b>SOUTHERN EDUCATION FOUNDATION</b> Atlanta, GA <i>For the Education Amendment Working Group (Collaboration with Education)</i>	250,000
<b>STANFORD UNIVERSITY</b> Stanford, CA <i>For a meeting on the resort by states to preventive force</i> <i>For general support of the Stanford Institute for Economic Policy Research</i>	120,000 800,000
<b>UNITED NATIONS FOUNDATION</b> Washington, DC <i>For general support for regions affected by the December 2004 tsunami (Collaboration with Population)</i>	202,000
<b>UNIVERSITY OF CALIFORNIA AT BERKELEY</b> Berkeley, CA <i>For the renovation and naming of the Roger Heyns Reading Room at the U.C. Berkeley Bancroft Library</i>	1,250,000
<b>UNIVERSITY OF SOUTHERN CALIFORNIA</b> Los Angeles, CA <i>For a series of impartial, nonpartisan analyses of four ballot initiatives facing California voters in the November 2005 special election (Collaboration with Education and Population)</i>	70,000
<b>WORKING PARTNERSHIPS USA</b> San Jose, CA <i>For the California Values Project (Collaboration with Education)</i>	125,000
<b>YALE UNIVERSITY</b> New Haven, CT <i>For a three-year Leadership Training Program designed to serve those in the most senior ranks of Chinese governmental officials</i>	574,718

# *Advice to Applicants*

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**T**hank you very much for your interest in The William and Flora Hewlett Foundation. We ask that all organizations interested in applying for a grant carefully read the information available on the Foundation's Web site ([www.hewlett.org](http://www.hewlett.org)) about the Foundation's Programs and priority areas. Please refer to the Foundation's General Program overview or proceed directly to guidelines for a particular Program.

We have the following guidelines:

The Foundation makes grants to nonprofit charitable organizations classified as 501(c)(3) public charities by the Internal Revenue Service. The Foundation does not make grants to individuals.

The Foundation normally does not make grants intended to support basic research, capital construction funds, endowment, general fundraising drives, fundraising events, or debt reduction. It does not make grants intended to support candidates for political office, to influence legislation, or to support sectarian or religious purposes.

If, after review of our priorities, you believe your objectives fit within the guidelines of a particular Program, you should complete the Letter of Inquiry form in the relevant Program section of the Foundation's Web site for initial review. (For example, if you are interested in an Education Program grant, go to [www.hewlett.org](http://www.hewlett.org), click on "Education," and then click on "Guidelines for Grant-seekers." There you will find the link to the Letter of Inquiry.)

After your letter of inquiry is received and reviewed, you may be invited to submit an application. Please do not submit a full proposal until you are invited to do so.

After careful consideration of your letter, our Program staff will contact you to let you know whether to submit a full proposal. Please note that a request to submit a proposal does not guarantee funding, but rather is a second step in the review process. If invited, you will be asked to complete a proposal using our Common Format.

Grants are awarded on the basis of merit, educational importance, relevance to Program goals, and cost-effectiveness.

# Financial Statements

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THE WILLIAM AND FLORA HEWLETT FOUNDATION

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## REPORT OF INDEPENDENT AUDITORS

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*To the Board of Directors of  
The William and Flora Hewlett Foundation*

In our opinion, the accompanying statements of financial position and the related statements of activities and changes in net assets and of cash flows present fairly, in all material respects, the financial position of The William and Flora Hewlett Foundation (“the Foundation”) at December 31, 2005 and 2004, and the changes in its net assets and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America. These financial statements are the responsibility of the Foundation’s management. Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits of these statements in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements, assessing the accounting principles used and significant estimates made by management, and evaluating the overall financial statement presentation. We believe that our audits provide a reasonable basis for our opinion.

*PricewaterhouseCoopers LLP*

SAN FRANCISCO, CALIFORNIA  
MARCH 3, 2006

*Statements of Financial Position*  
(Dollars in Thousands)

	December 31	
	2005	2004
<b>ASSETS</b>		
Investments, at fair value		
Hewlett-Packard and Agilent common stock	\$ 453,354	\$ 330,690
Other public domestic equities	2,243,327	2,311,713
Public international equities	1,988,577	1,725,343
Private equities	1,260,111	938,939
Fixed income	1,805,724	1,578,450
Net payable on forward fixed income transactions	(833,323)	(608,295)
Cash equivalents	158,484	120,796
Net (payable) receivable from unsettled securities purchases and sales	(14,541)	113
Other	15,835	28,045
Total investments	<u>7,077,548</u>	<u>6,425,794</u>
Cash	4,706	3,422
Federal excise tax refund	3,199	-
Collateral under securities lending agreement	211,120	15,691
Prepaid expenses and other assets	4,759	3,690
Distribution receivable from Hewlett Trust	117	4,398
Fixed assets, net of accumulated depreciation & amortization	34,682	36,173
	<u>7,336,131</u>	<u>\$ 6,489,168</u>
<b>LIABILITIES AND NET ASSETS</b>		
Accounts payable and accrued liabilities	10,903	10,724
Accrued post-retirement health care benefit	3,212	2,916
Payable under securities lending agreement	211,120	15,691
Federal excise tax payable currently	-	2,702
Deferred federal excise tax	9,776	7,773
Grants payable	116,582	122,318
Gift payable, net of discount	83,368	202,833
Total liabilities	<u>434,961</u>	<u>364,957</u>
Commitments (Note 3)		
Unrestricted net assets	6,901,053	6,119,813
Temporarily restricted net assets	117	4,398
Total net assets	<u>6,901,170</u>	<u>6,124,211</u>
	<u>7,336,131</u>	<u>6,489,168</u>

See accompanying notes to the financial statements on pp. 108–114.

*Statements of Activities and  
Changes in Net Assets  
(Dollars in Thousands)*

	Year Ended December 31	
	2005	2004
<b>UNRESTRICTED NET ASSETS</b>		
Net investment revenues and gains:		
Interest, dividends and other	\$ 153,897	\$ 133,847
Gain on investment portfolio	870,331	633,671
Investment management expense	(25,149)	(21,729)
Net investment income	999,079	745,789
Net federal excise tax expense on net investment income (Note 9)	(8,554)	(7,145)
Net investment revenues	990,525	738,644
Expenses:		
Grants awarded, net of cancellations	(177,802)	(168,773)
Change in gift discount (Note 8)	(15,535)	(11,936)
Direct and other charitable activities	(3,101)	(4,110)
Cumulative effect of adopting FAS No. 106, post-retirement health care benefit cost	-	(2,426)
Administrative expenses	(17,119)	(16,429)
Total expenses	(213,557)	(203,674)
Income over expenses before net assets released from time restriction	776,968	534,970
Net assets released from time restriction (Note 4)	4,272	363,008
Change in unrestricted net assets	781,240	897,978
<b>TEMPORARILY RESTRICTED NET ASSETS</b>		
Temporarily restricted revenues:		
Change in value of Trust receivable	(9)	41,584
Net assets released from time restriction	(4,272)	(363,008)
Change in temporarily restricted net assets	(4,281)	(321,424)
Change in total net assets	776,959	576,554
Net assets at beginning of year	6,124,211	5,547,657
Net assets at end of year	6,901,170	6,124,211

See accompanying notes to the financial statements on pp. 108–114.

*Statements of Cash Flows*  
*(Dollars in Thousands)*

	Year Ended December 31	
	2005	2004
Cash flows used in operating activities:		
Interest and dividends received	\$ 152,846	\$ 134,225
Cash paid for federal excise tax	(12,452)	(2,063)
Cash paid to suppliers and employees	(44,025)	(36,478)
Cash contributions received	4,272	15,000
Grants and gift paid	(318,538)	(267,477)
Net cash used in operating activities	<u>(217,897)</u>	<u>(156,793)</u>
Cash flows from investing activities:		
Purchases of fixed assets	(448)	(437)
Proceeds from sale of fixed assets	2	-
Cash received from partnership distributions	254,022	170,270
Proceeds from sale of investments	23,153,697	16,588,019
Purchase of investments	(23,188,092)	(16,597,786)
Net cash from investing activities	<u>219,181</u>	<u>160,066</u>
Net increase in cash	1,284	3,273
Cash at beginning of year	3,422	149
Cash at end of year	<u><u>4,706</u></u>	<u><u>3,422</u></u>

See accompanying notes to the financial statements on pp. 108–114.

*Statements of Cash Flows*  
(Dollars in Thousands)

	Year Ended December 31	
	2005	2004
Reconciliation of change in net assets to net cash used in operating activities:		
Change in total net assets	\$ 776,959	\$ 576,554
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation and amortization of property and equipment	1,956	1,956
Amortization of discount on gift payable	15,535	11,936
Unrealized loss on program related investment	-	82
Loss on sale of fixed assets	10	-
Net unrealized and realized gain on investments	(870,331)	(633,671)
Increase in deferred federal excise tax	2,003	2,606
Increase in accrued post-retirement health care benefit	296	2,916
(Increase) decrease in value of Trust receivable	9	(41,584)
Changes in operating assets and liabilities:		
(Increase) decrease in interest and dividends receivable	(1,040)	432
(Increase) decrease in federal excise tax	(5,901)	2,476
Decrease (increase) in prepaid expenses and other assets	(1,069)	187
Decrease in receivable from Hewlett Trust	4,263	15,000
Increase in accounts payable and accrued liabilities	149	3,021
Decrease in grants payable	(5,736)	(19,704)
Decrease in gift payable	(135,000)	(79,000)
Net cash used in operating activities	<u>\$ (217,897)</u>	<u>\$ (156,793)</u>
Supplemental data for non-cash activities:		
Stock contributions received from Hewlett Trust	<u>\$ 1</u>	<u>\$ 347,963</u>

See accompanying notes to the financial statements on pp. 108–114.

*Notes to Financial Statements*  
*December 31, 2005 and 2004*  
*(Dollars in Thousands)*

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## NOTE 1

*The Organization*

The William and Flora Hewlett Foundation (the "Foundation") is a private foundation incorporated in 1966 as a non-profit charitable organization. The Foundation's grantmaking activities are concentrated in the program areas of education, environment, performing arts, population and global development. More detailed information regarding the Foundation's charitable activities can be obtained from the Foundation's website at [www.hewlett.org](http://www.hewlett.org) or by requesting a copy of its annual report.

## NOTE 2

*Significant  
Accounting Policies*

**Basis of presentation.** The accompanying financial statements have been prepared on the accrual basis of accounting.

**Investments.** Investments in stocks and bonds which are listed on national securities exchanges, quoted on NASDAQ or on the over-the-counter market are valued at the last reported sale price or in the absence of a recorded sale, at the value between the most recent bid and asked prices. Futures, forwards, swaps and options which are traded on exchanges are valued at the last reported sale price or, if they are traded over-the-counter at the most recent bid price. Index and credit swaps, which gain exposure to domestic equities and fixed income securities in a leveraged form, are traded with a counterparty and are valued at each month end. Short-term investments are valued at amortized cost, which approximates market value. Since there is no readily available market for investments in limited partnerships, such investments are valued at amounts reported to the Foundation by the general partners of such entities. The investments of these limited partnerships, such as venture capital, buyout firms and real estate partnerships, include securities of companies that may not be immediately liquid. Accordingly, their values are based upon guidelines established by the general partners. The December 31 valuation of certain of the investments in limited partnerships are based upon the value determined by each partnership's general partner as of September 30 and adjusted for cash flows that occurred during the quarter ended December 31. Management believes this method provides a reasonable estimate of fair value. These values may differ significantly from values that would have been used had a readily available market existed for such investments, and the differences could be material to the change in net assets of the Foundation.

Investment transactions are recorded on trade date. Realized gains and losses on sales of investments are determined on the specific identification basis. Investments donated to the Foundation are initially recorded at market value on the date of the gift.

Foreign currency amounts are translated into U.S. dollars based upon exchange rates as of December 31. Transactions in foreign currencies are translated into U.S. dollars at the exchange rate prevailing on the transaction date.

Cash equivalents consist of money market mutual funds and foreign currency held for investment purposes.

**Cash.** Cash consists of funds held in a commercial interest-bearing account, for operating expenses.

**Fixed assets.** Fixed assets are recorded at cost and depreciated using the straight-line basis over their estimated useful lives. The headquarters building and associated fixtures are generally depreciated using the straight-line basis over ten to fifty years. Furniture and computer and office equipment are depreciated over estimated useful lives of three to ten years.

**Grants.** Grants are accrued when awarded by the Foundation.

**Use of estimates.** The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements. Estimates also affect the reported amounts of changes in net assets during the reporting period. Actual results could differ from those estimates.

**Reclassifications.** Certain reclassifications have been made to the 2004 balances to conform to the 2005 presentation. These reclassifications had no effect on the change in net assets in 2004 or total net assets at December 31, 2004.

NOTE 3  
*Investments*

The investment goal of the Foundation is to maintain or grow its asset size and spending power in real (inflation adjusted) terms with risk at a level appropriate to the Foundation's program objectives. The Foundation diversifies its investments among various financial instruments and asset categories, and uses multiple investment strategies. As a general practice, except for the Foundation's holdings in Hewlett-Packard and Agilent stock and certain index swaps, all financial assets of the Foundation are managed by external investment management firms selected by the Foundation. All financial assets of the Foundation are held in custody by a major commercial bank, except for assets invested with partnerships and commingled funds, which have separate arrangements related to their legal structure.

The majority of the Foundation's assets are invested in equities, which are listed on national exchanges, quoted on NASDAQ, or in the over-the-counter market; treasury and agency bonds of the U.S. government; and investment grade corporate bonds for which active trading markets exist. Net realized and unrealized gains and losses on investments are reflected in the Statements of Activities and Changes in Net Assets.

The gain on the Foundation's investment portfolio for the years ended December 31, 2005 and 2004 consists of the following:

	<b>2005</b>	<b>2004</b>
Net realized gain	\$ 464,553	\$ 394,084
Net unrealized gain	405,779	239,587
	<u>\$ 870,332</u>	<u>\$ 633,671</u>

Approximately 18 percent of the Foundation's investments at December 31, 2005 were invested with various limited partnerships that invest in the securities of companies that may not be immediately liquid, such as venture capital and buy-out firms, and in real estate limited partnerships or private REITs that have investments in various types of properties. As of December 31, 2005 the Foundation is committed to contribute approximately \$1,594,900 in additional capital in future years to various partnerships.

Investment securities are exposed to various risks, such as changes in interest rates or credit ratings and market fluctuations. Due to the level of risk associated with certain investment securities and the level of uncertainty related to changes in the value of investment securities, it is possible that the value of the Foundation's investments and total net assets balance could fluctuate materially.

The investments of the Foundation include a variety of financial instruments involving contractual commitments for future settlements, including futures, swaps, forwards and options which are exchange traded or are executed over-the-counter. Some investment managers retained by the Foundation have been authorized to use certain financial derivative instruments in a manner set forth by either the Foundation's written investment policy, specific manager guidelines or partnership/fund agreement documents. Specifically, financial derivative instruments may be used for the following purposes: (1) currency forward contracts and options may be used to hedge nondollar exposure in foreign investments, or to take positions in managed currency portfolios; (2) futures and swap contracts may be used to rebalance asset categories within the portfolio or to manage market exposures in managed portfolios; and (3) futures contracts, swaps and options may be used to hedge or leverage positions in managed portfolios. Financial derivative instruments are recorded at fair value in the Statements of Financial Position with changes in fair value reflected in the Statements of Activities and Changes in Net Assets.

The total value of investments pledged with respect to options and futures contracts at December 31, 2005 and 2004 was \$5,770 and \$7,210 respectively. The value of cash held at brokers as collateral for variation margin at December 31, 2005 and 2004 was \$15,393 and \$12,613 respectively.

Certain of the Foundation's managers purchase or sell fixed income securities on a delayed delivery or forward settled basis. These transactions involve a commitment by the Foundation to purchase or sell securities for a predetermined price or yield, with payment and delivery taking place beyond the customary settlement period, from about 1 to 3 months. When purchasing a security on a delayed delivery basis, the Foundation assumes the rights and risks of ownership of the security, including the risk of price and yield fluctuations, and reflects such fluctuations in its net assets. The manager may dispose of or renegotiate a delayed delivery transaction after it is entered into, and may sell the securities before they are delivered, which may result in a capital gain or loss. At December 31, 2005 and 2004 the net liability for these forward purchases and

sales was \$833,323 and \$608,295 respectively.

Premiums received with respect to open options contracts at December 31, 2005 and 2004 were \$628 and \$143, respectively.

Other investment assets of \$15,835 and \$28,045 at December 31, 2005 and 2004, respectively, consist of a parcel of land held for investment purposes, receivables for interest and dividends, and certain derivatives held at fair market value. At December 31, 2005 and 2004 these derivatives included swap contracts, futures contracts, foreign exchange contracts and put and call options, as shown in the table below.

In the opinion of the Foundation's management, the use of financial derivative instruments in its investment program is appropriate and customary for the investment strategies employed. Using those instruments reduces certain investment risks and may add value to the portfolio. The instruments themselves, however, do involve investment and counterparty risk in amounts greater than what are reflected in the Foundation's financial statements. Management does not anticipate that losses, if any, from such instruments would materially affect the financial position of the Foundation.

Fair values of the Foundation's derivative financial instruments at December 31, 2005 and 2004 are summarized in the following table. This table excludes exposures relating to derivatives held indirectly through commingled funds.

DERIVATIVE FINANCIAL INSTRUMENTS	Year Ended December 31	
	2005	2004
	Fair Value (in thousands)	Fair Value (in thousands)
	<b>Equity contracts:</b>	
Futures and swap contracts: Assets	\$ 1,164	\$ 14,624
Put and call options: Liabilities	(345)	-
	<b>Fixed income contracts:</b>	
Futures and swap contracts: Liabilities	\$ (369)	\$ (724)
Put and call options: Liabilities	(268)	(72)
Forward net purchases and sales: Liabilities	\$ (833,323)	\$ (608,295)
	<b>Foreign currency contracts:</b>	
Forward contracts		
Unrealized gain on currency contracts	\$ 14,964	\$ 1,913
Unrealized loss on currency contracts	(12,217)	(2,858)

The Foundation's custodian maintains a securities lending program on behalf of the Foundation, and maintains collateral at all times in excess of the value of the securities on loan. Investment of this collateral is in accordance with specified guidelines; these investments include A1-rated commercial paper, repurchase agreements, asset backed securities and floating rate notes. Income earned on these transactions is included in net investment revenue in the Statements of Activities and Changes in Net Assets. The value of securities on loan at December 31, 2005 and 2004 was \$202,644 and \$14,946 respectively. The value of the collateral received at December 31, 2005 and 2004 aggregated \$211,120 and \$15,691 respectively, of which \$211,120 and \$15,691 respectively, was received in cash and was invested in accordance with the investment guidelines. The remainder of the collateral, \$0 at December 31, 2005 and \$0 at December 31, 2004 was received in the form of securities and letters of credit.

At December 31, 2005, the net receivable from unsettled securities purchases and sales includes a receivable from brokers of \$182,062 and a payable to brokers of \$196,603. At December 31, 2004, the net receivable from unsettled securities purchases and sales included a receivable from brokers of \$51,662 and a payable to brokers of \$51,549.

The Foundation held 10.2 million shares of Hewlett-Packard Company ("Hewlett-Packard") stock with a market price of \$28.63 per share at December 31, 2005. At December 31, 2004, the Foundation held 10.2 million shares with a market price of \$20.97 per share. The Foundation held 4.8 million shares of Agilent Company ("Agilent") stock with a market price of \$33.29 per share at December 31, 2005. At December 31, 2004, the Foundation held 4.8 million shares with a market price of \$24.10.

NOTE 4  
*Distributions  
Receivable from the  
William R. Hewlett  
Trusts*

Upon the death of William R. Hewlett on January 12, 2001, the Foundation became the residuary beneficiary of the William R. Hewlett Revocable Trust ("the Trust") and is entitled to receive the trust assets remaining after payment of expenses of administration and federal and state estate taxes. The Trust is expected to be fully distributed during 2006.

The receivable from the Trust, which was \$4,398 at December 31, 2004, was adjusted for contributions during 2005 and also for expenses. During 2005, distributions from the Trust totaled \$4,272, which consisted of cash of \$4,271 and warrants valued at \$1. The Trust paid expenses of \$9 during 2005. At December 31, 2005, the value of the remaining assets to be distributed to the Foundation by the Trust was \$117. These assets consist of cash and cash equivalents and are reflected in the financial statements as temporarily restricted net assets because the distribution will be received in the future.

The Foundation is also the residuary beneficiary of the Hewlett Marital Trust. As of December 31, 2005, the assets which the Foundation is entitled to receive are not material and can not be reasonably estimated.

NOTE 5  
*Fixed Assets*

Fixed assets consist of the following at December 31, 2005 and 2004:

	<u>2005</u>	<u>2004</u>
Building, land lease and land improvements	\$ 34,013	\$ 33,927
Furniture and fixtures	4,776	4,593
Computer and office equipment	<u>2,887</u>	<u>2,910</u>
	41,677	41,430
Less accumulated depreciation and amortization	<u>(6,994)</u>	<u>(5,257)</u>
	<u>\$ 34,683</u>	<u>\$ 36,173</u>

NOTE 6  
*Postretirement  
Healthcare Benefits*

The Foundation implemented Statement of Financial Accounting Standards (SFAS) No. 106, "Employers' Accounting for Postretirement Benefits Other Than Pensions" effective January 1, 2004 and recognizes the accumulated liability for its postretirement healthcare benefit obligation, using a discount rate of 5.5%. The obligation, which is unfunded, is \$3,213 as of December 31, 2005, as shown in the table below:

	<u>2005</u>	<u>2004</u>
Accumulated post-retirement benefit obligation as of January 1	\$ 2,916	\$ 2,426
Service cost	296	356
Interest cost	135	159
Amortized gain, due to change in actuarial inputs	(105)	-
Benefits paid by employer	<u>(29)</u>	<u>(25)</u>
Accumulated post-retirement benefit obligation as of December 31	<u>\$ 3,213</u>	<u>\$ 2,916</u>

Annual expense for the year ended December 31, 2005 was \$431 on an on-going basis, and \$325 following the amortization of a gain due to the 2005 change in actuarial inputs. Annual expense for the year ended December 31, 2004 was \$515.

NOTE 7  
*Grants Payable*

Grant requests are recorded as grants payable when they are awarded. Some of the grants are payable in installments, generally over a three-year period. Grants authorized but unpaid at December 31, 2005 are payable as follows:

Year payable	<b>Amount</b>
2006	\$ 102,937
2007	13,208
2008 and thereafter	437
	<u>\$ 116,582</u>

NOTE 8  
*Gift Payable*

The Foundation pledged a gift of \$400,000 in April of 2001 to Stanford University for the School of Humanities and Sciences and for the undergraduate education program. The gift will be paid over a period of seven years and is discounted to a net present value as of December 31, 2005 using a risk-free rate of 5.1%. Payments of \$135,000 and \$79,000 were made in 2005 and 2004, respectively.

The gift payable, net of discount, at December 31, 2005 and 2004 is as follows:

	<b>2005</b>	<b>2004</b>
Gift payable	\$ 88,476	\$ 223,476
Less unamortized discount	<u>(5,108)</u>	<u>(20,643)</u>
Gift payable, net of discount	<u>\$ 83,368</u>	<u>\$ 202,833</u>

NOTE 9  
*Federal Excise and Unrelated Business Income Tax*

The William and Flora Hewlett Foundation is a private foundation and qualifies as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and corresponding California provisions. Private foundations are subject to a federal excise tax on net investment income and may reduce their federal excise tax rate from 2% to 1% by exceeding a certain payout target for the year. The Foundation qualified for the 1% tax rate in both 2005 and 2004. Each year, current federal excise tax is levied on interest and dividend income of the Foundation; net investment losses do not reduce investment income. At December 31, 2005 and 2004, deferred federal excise tax is provided at 1.33%, which is the average effective rate expected to be paid on unrealized gains on investments. Certain investments may also generate unrelated business income tax.

The expense for federal excise tax is as follows:

	<b>2005</b>	<b>2004</b>
Current	\$ 6,551	\$ 4,539
Deferred	<u>2,003</u>	<u>2,606</u>
	<u>\$ 8,554</u>	<u>\$ 7,145</u>

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