

GRANT AGREEMENT

This grant agreement (this “Agreement”) is made effective on July 1, 2020, (the “Effective Date”) between **President and Fellows of Harvard College** (the “University”), a Massachusetts nonprofit corporation, and the **Charles Koch Foundation**, a Kansas nonprofit corporation (the “Donor”). This Agreement is for the benefit of the Program on Education Policy and Governance (the “Program”), which is housed in the Harvard Kennedy School (the “School”) at the University. The University and the Donor are sometimes referred to in this Agreement individually as a “Party” and collectively as the “Parties.” The Parties agree as follows:

1. **Promoting Academic Freedom.** Consistent with the Donor’s principles of supporting open inquiry and a diversity of ideas in higher education, the Donor’s grant is intended to help promote a republic of science at the University where ideas can be exchanged freely and useful knowledge will benefit the well-being of individuals and society. Thus, the Parties agree that the academic freedom of the University, the Program, and their faculty, students, and staff is critical to the success of the Program’s research, scholarship, teaching, and service.

2. **The University’s Proposal.** The Parties enter into this Agreement based on the University’s proposal, which is hereby incorporated into and made part of this Agreement, and attached as Attachment A (the “Proposal”). The Proposal reflects the vision of and relies on the leadership of Dr. Paul E. Peterson, who was selected by the University, according to its normal procedures, to be the director of the Program (the “Program Director”). As stated in the Proposal and consistent with the Program Director’s vision, the mission of the Program is to provide high level scientific training for young scholars who can make independent contributions to scholarly research, foster a national community of scientific researchers, and produce path-breaking studies that provide a scientific basis for school reform (the “Program’s Mission”).

3. **The Program Activities.**
 - a. **Generally.** To support the Program’s Mission, the University desires to create the following positions and activities to affiliate with the Program, collectively referred to as the “Program Activities.” The Program Activities are described more fully in the Proposal and include “Graduate Student Support,” “Research and Programming Support,” “Personnel Support” and the online journal “EducationNext.” The University shall use any funds received under this Agreement to support the Program Activities in accordance with the terms of this Agreement. According to the University’s normal procedures, the Program Director is responsible for directing the Program Activities, which includes allocating and administering the Program’s budget, supervising Program staff, mentorship, and other duties to advance the Program’s Mission as deemed appropriate by the Program Director.

 - b. **Selection According to the University’s Normal Procedures.** The Parties mutually agree that the selection of the foregoing positions and fellowships by the University will follow the University’s normal procedures for selecting such positions and fellows for the applicable academic units. As a matter of academic freedom for academic units at the University, individuals who hold positions with or are affiliated with the Program must be approved by the Program Director, in accordance with the School’s and University’s normal procedures.

4. **The University’s Support for the Program.** The University shall support the Program Activities to advance the Program’s mission. As part of this support, the University shall ensure that the faculty, students, and staff working with the Program have adequate space to achieve the Program’s Mission. Therefore, the University shall provide the Program with sufficient office space including shared conference and meeting spaces.

5. **The Donor’s Support for the Program Activities.**

a. Contributed Amount. Subject to the terms of this Agreement, the Donor will contribute funds to the University solely to support the Program Activities to advance the Program's Mission (all or part of such funds are referred to as the "Contributed Amount(s)"). The maximum Contributed Amount for each Program Activities is as follows:

Program Activities	Contributed Amount
Costs and expenses for Graduate Student Support	Up to \$545,596
Costs and expenses for Research and Programming Support	Up to \$642,363
Costs and expenses for Personnel Support	Up to \$445,786
Costs and expenses for EdNext Journal	Up to \$1,016,255

b. Other Support. Solely with the University's approval, the Donor may also contribute in-kind services to the University to help promote the work of the University, the Program, or the University faculty, students, and staff.

c. Budget. The Parties agree that the University has the authority to make budgetary reallocations as necessary and in keeping with School and University policies and procedures to conduct the Program Activities.

6. Grant Process and Administration.

a. The University Grant Request. The University shall submit an annual written request according to the schedule below to the Donor for the Donor's consideration (the "University Grant Request"). If the Donor approves the University Grant Request, the Donor shall make a contribution up to the amount listed in the below schedule to the University, and the University shall accept such Contributed Amount. If the Donor does not approve the University Grant Request, the Donor is under no obligation to contribute any funds to the University. For the avoidance of doubt, the Donor's acceptance of the University Grant Request will be based solely on the University's good faith effort in performing the Program Activities.

b. The University Grant Request and Proposed Grant Award Schedule.

University Grant Request Date	Donor Response and Proposed Contribution Date	Contributed Amount
Submitted as the Proposal	Within sixty (60) days of the Parties signing this Agreement	Up to \$533,745
June 1, 2021	On or about August 1, 2021	Up to \$557,128
June 1, 2022	On or about August 1, 2022	Up to \$554,334
June 1, 2023	On or about August 1, 2023	Up to \$566,180
June 1, 2024	On or about August 1, 2024	Up to \$438,613
Total Maximum Aggregate Contributed Amount:		\$2,650,000

c. The Fund. The University shall place all of the Contributed Amount in a segregated and restricted fund (the "Fund"), in accordance with University policies and procedures. The University shall solely use the Fund to support the Program Activities as stated in this Agreement.

7. Contributed Amount Used Solely for Charitable Purposes for the Program Activities.

a. Tax Status. According to IRS records, the University is an organization described within the meaning of Internal Revenue Code (the “Code”) sections 501(c)(3) and 509(a)(1). The University shall immediately notify the Donor if its tax status changes.

b. Charitable Purpose. The University shall use the Contributed Amount solely for the Program Activities, which is a charitable purpose described in section 170(c)(2)(B) of the Code. The University shall not use the Contributed Amount to influence legislation as described in section 4945(d)(1) of the Code, to influence the outcome of any election, for a political campaign or intervention, to carry on any voter registration drive, or any other purpose that would jeopardize the Donor’s tax-exempt status or subject the Donor to penalties under Chapter 42 of the Code.

c. Program Activities. The University shall return to the Donor any Contributed Amount not spent for the Program Activities.

8. Use of Names.

a. Except as provided below, neither Party shall use or register the other Party’s name (alone or as part of another name) or any logos, seals, insignia or other words, names, symbols or devices that identify the other Party, including any school, unit, division or affiliate of such Party (such Party’s “Names”), for any marketing, publicity or promotional purpose except with the prior written approval of, and in accordance with any restrictions required by, the Party whose Names are to be used. Any such requests for use of the University’s Names shall be submitted to trademark_useofname@harvard.edu, with a copy to the Program Director. Any such requests for use of the Donor’s Names shall be submitted in writing to the Donor’s General Counsel.

The Parties agree that each Party may respond to legitimate business inquiries with factual information regarding the existence and purpose of the relationship that is the subject of this Agreement, or disclose such information to satisfy any financial reporting obligations, without written permission from the other Party. In any such statement, the relationship of the Parties shall be accurately and appropriately described.

9. Intellectual Property and Publication.

a. Donor agrees that University shall own the entire right, title and interest, including all patents, copyrights, and other intellectual property rights, in and to all tangible materials, inventions, discoveries, works of authorship, software, information and data conceived or developed in the performance of the Program Activities.

University has the right to publish and otherwise publicly disclose information derived from performance of the Program Activities under this Agreement.

10. General Terms.

a. Term. The term of this Agreement is from July 1, 2020 to the later of July 31, 2025, or until the University has spent all of the Contributed Amount, unless earlier terminated pursuant to this Agreement. The Parties expect and agree that at the conclusion of the approved Term, including any mutually agreed upon extensions, the Donor will have contributed the Total Maximum Aggregate Contributed Amount.

b. Termination. The Donor has the right to terminate this Agreement if: (i) the University breaches any term of this Agreement; (ii) the Program Activities are not advancing the Program’s Mission; or (iii) such action is necessary to comply with any law applicable to the University or the Donor. Such termination is effective upon the expiration of thirty days from the date

notice was provided by the Donor to the University. If the Agreement is terminated, the University shall return all unspent Contributed Amounts to the Donor within forty-five days of the Donor's request. The University is not relying on the Donor's proposed funding under this Agreement to incur any obligation or take any action or inaction.

c. Publicity. The Parties shall give each other a reasonable opportunity to review any significant public announcement related to the Agreement. The Parties shall not use each other's logos without the applicable Party's express written consent.

d. Donor Notice. The University shall notify the Donor upon receiving records requests for this Agreement or related information.

e. Entire Agreement. The terms contained in this Agreement supersede all prior oral or written agreements and understandings between the Parties related to the matters contained in this Agreement and constitute the entire agreement between the Parties with respect to the matters contained in this Agreement.

f. Order of Precedence. If there is a conflict between the terms of this Agreement and the terms in the Proposal, this Agreement controls.

g. Amendments. No amendment to this Agreement will be effective unless it is in writing and signed by the Parties.

h. Severability. The terms of this Agreement are severable. If any court of competent jurisdiction construes any term of this Agreement to be illegal, invalid, or unenforceable, the legality, validity, and enforceability of the remaining terms of this Agreement will not be affected.

i. No Waiver. No delay or failure by any Party to enforce any right or claim under this Agreement is a waiver of such right or claim. Any waiver by any Party of any term of this Agreement is not a further or continuing waiver of such term.

j. Third Party Rights. This Agreement does not confer any rights or remedies upon any third party other than the permitted assigns of the Parties.

k. No Assignment. Neither Party may transfer or assign its interest in the Agreement or any amount to be contributed pursuant to this Agreement without the express written consent of the other Party.

l. Notice. All notices in connection with this Agreement must be in writing and are effective when delivered personally by hand or one business day after the day sent by overnight courier at the address below, or to another address provided by a Party to the other Parties.

If to the University:

President and Fellows of Harvard College
1033 Massachusetts Ave, 5th Floor
Cambridge, MA 02138
Attn: Meghan Coughlin
meghan_coughlin@harvard.edu


If to the Donor:

Charles Koch Foundation
1320 N. Courthouse Road, Suite 500
Arlington, VA 22201
Attn: Grant Administrator
Cc: General Counsel's Office

m. Counterparts. This Agreement may be executed in several counterparts, each of which constitutes an original and all of which, when taken together, constitute one agreement or direction. Copies of signatures (whether facsimile or other electronic transmission) to this Agreement are deemed to be originals and may be relied upon to the same extent as the originals.

The Parties have hereby executed this Agreement as dated below, but agree that this Agreement is effective as of the Effective Date.

**PRESIDENT AND FELLOWS OF HARVARD
COLLEGE**

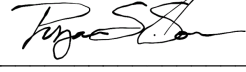
By: 

Name: Carolina Harvey

Title: Grants and Contracts Officer

Date: August 20, 2020

CHARLES KOCH FOUNDATION

By: 

Name: Ryan Stowers

Title: Executive Director

Date: 9/11/2020

ATTACHMENT A

Accelerating the Pace of Education Reform

A Proposal Submitted to the Charles Koch Foundation
by the Harvard Program on Education Policy and Governance
Taubman Center on State and Local Government Harvard
Kennedy School
Harvard University

Paul E. Peterson, Director
Martin R. West, Deputy Director and Editor-In-Chief of
Education Next

May 19, 2020

The Opportunity

The U.S. education sector is vast, influential, and ripe for fact-based reform.

Approximately 55 million American children are enrolled in elementary schools and high school. American colleges and graduate schools enroll another 22 million students.¹

These schools touch the lives of hundreds of millions more Americans who are parents, taxpayers, or donors funding the approximately \$668 billion a year spent on U.S. public K-12 education and \$559 billion a year on colleges and universities.

Because the sector is so vast, even small improvements in efficiency or in quality have the potential to translate, if they can be replicated or scaled, into enormous cost savings or improvements in educational outcomes. Improved outcomes, in turn, could mean increased growth and American competitiveness in the global economy, and an American population better prepared to participate in the choices of citizens in a democratic republic.² Finally, American education has long functioned as a ladder of upward mobility. With recent evidence suggesting that absolute income mobility in the U.S. has slowed in recent decades, a focus on educational opportunity leading to work and self-sufficiency may be part of a compelling political vision firmly rooted in the tradition of the American Dream.³

The Program

The Harvard Program on Education Policy and Governance, established in 1996, has earned a reputation for excellence and rigor. We provide high-level scientific training for young scholars who can make independent contributions to scholarly research. We foster a national community of reform-minded scientific researchers. And we produce path-breaking studies that provide a scientific basis for school reform policy. Since 2001, the program has also published *Education Next*, a journal that has established itself as an influential voice shaping the national conversation around school choice and promoting policymaking that expands options for families.⁴

¹ All statistics in this section are drawn from National Center for Education Statistics, “2018 Digest of Education Statistics,” U.S. Department of Education. URL: https://nces.ed.gov/programs/digest/2018menu_tables.asp.

² Hanushek, E. A. & Woessmann, L. (2008). The role of cognitive skills in economic development. *Journal of Economic Literature*, 46(3), 607-68; West, M. R. (2012). Education and global competitiveness. In K. Hassett (Ed.), *Rethinking Competitiveness* (pp. 68-94). Washington DC: American Enterprise Institute Press; Nie, N. H., et al. (1996). *Education and Democratic Citizenship in America*. Chicago: University of Chicago Press.

³ Chetty, R., et al. (2017). The fading American dream: Trends in absolute income mobility since 1940. *Science*, 356(6336), 398-406.

⁴ The *Program in Education Policy and Governance* (PEPG) is a program in the Department of Government of the Faculty of Arts and Sciences and in the Taubman Center for State and Local Government at the Harvard Kennedy School. Professors Paul Peterson and Martin West are the PEPG director and deputy director, and also the principal and co-principal investigator, respectively, of the current proposal being submitted to the Charles Koch Foundation. The *Education Next Institute, Inc.* (ENI), is a Delaware corporation established in 2017. Paul Peterson currently serves as the vice-president and Martin West as the president of ENI. ENI owns the copyright to the print edition of

By many important measures, the Program on Education Policy and Governance and *Education Next* have been phenomenal, beyond-our-wildest-dreams successes. Graduates from its doctoral and postdoctoral fellowship programs include:

Christopher Berry, William J. and Alicia Townsend Friedman Professor at the University of Chicago's Harris School of Public Policy

David Campbell, Packey J. Dee Professor of American Democracy at the University of Notre Dame and chair of Notre Dame's political science department

Albert Cheng, assistant professor in the Department of Education Reform, University of Arkansas

Matthew Chingos, vice president of the Urban Institute and director of its Center on Education Data and Policy

Anna Egalite, assistant professor in the Department of Educational Leadership, Policy, and Human Development in the College of Education at North Carolina State University

Jay P. Greene, distinguished professor and chair, Department of Education Reform, University of Arkansas

Daniel Hamlin, assistant professor in the Department of Educational Leadership and Policy Studies, University of Oklahoma

Michael Henderson, Tom Jarreau Hardin Professor and director, Public Policy Research Lab, Louisiana State University

Frederick Hess, resident scholar and director of education policy studies, American Enterprise Institute

Marci Kanstoroom, executive editor, *Education Next*

Beth Schueler, assistant professor of education and public policy, Curry School of Education, University of Virginia

Martin West, professor at the Harvard Graduate School of Education, editor-in-chief, *Education Next*, and member, Massachusetts state Board of Elementary and Secondary Education

Ludger Woessmann, professor of economics, University of Munich, Germany, and director, ifo Center for the Economics of Education

Patrick Wolf, Distinguished Professor of Education Policy and 21st Century Endowed Chair in School Choice in the Department of Education Reform, University of Arkansas.

The Program on Education Policy and Governance has a long track record, even prior to the creation of the current fellowship program, of launching master's degree students on impactful careers in education policy. For example, Jason Bedrick, is now director of policy at EdChoice, where his [online bio](#) lists his "favorite teacher/class" as "Prof. Marty West, 'Market-Based Education Reform.'" While a Kennedy School student, Bedrick, a former Republican member of the New Hampshire state legislature, wrote a thesis under Paul Peterson's direction entitled "Choosing to Learn" that was released by the Josiah Bartlett Center and played a key role in the enactment of New Hampshire's tax-credit scholarship program. Another recent Kennedy School graduate, Amanda Olberg, became involved in *Education Next* as a student and served as the journal's managing editor for several years, before accepting a senior role as an education project manager at the Dalio Foundation. Andrew Solomon, who took courses from and worked closely with Martin West as a master's degree student, is now chief financial officer at Excel Academy Charter Schools in Boston.

Four of the five master's degree students in the first cohort receiving fellowships, who graduated in May 2018, now work in education or a closely related field; the fifth is a joint degree candidate now finishing her J.D. at Harvard Law School. Molly Siguler Thomas directs Strategic Projects in the Office of Finance and Operations at Boston Public Schools; Marie Perrot is a Research Associate at the Ounce of Prevention Fund; Kim Howard is a Government Innovation Fellow in Chicago's Department of Family and Support Services; and Laura White is Assistant Chief Administrative Officer for the City of Philadelphia.

In 2017, at a Harvard conference on the future of school choice, Secretary of Education Betsy DeVos addressed the founder and director of the Harvard Program on Education Policy and Governance, *Education Next* senior editor Paul Peterson, saying, "I want to recognize the significant and influential contributions to the advancement of school choice you've made over the years, through both the Program on Education Policy and Governance here at Harvard and *Education Next*; few scholars have left such indelible fingerprints on this critical conversation."

Secretary DeVos was just one of many distinguished visitors from the world of education policy and practice that the Harvard Program on Education Policy and Governance has brought to the Harvard campus and exposed to Harvard students and future policymakers and practitioners. Other recent visitors have included the governor of New Hampshire, Christopher Sununu; the CEO of the KIPP Foundation, Richard Barth; the superintendent of Miami-Dade County Public Schools, Alberto Carvalho; an associate justice of the Arizona Supreme Court, Clint Bolick; a columnist of the Wall Street Journal, Jason Riley; a former schools chancellor of the District of Columbia, Michelle Rhee, and a former secretary of education of New Mexico, Hanna Skandera.

A 2015 study of news media coverage of education published by *Educational Researcher*, the flagship journal of the American Educational Research Association, found that “The most frequently mentioned education journal was *Education Next*.” The journal’s research findings are widely disseminated to the large audiences of other news organizations. For example, the 2018 *Education Next* Poll was the subject of an article on the Associated Press wire, “[Poll: Support for school choice growing among Republicans](#).” That AP item, in turn, was reprinted in 260 state, regional, and local outlets, including the *Boston Herald*, *Houston Chronicle*, *Chicago Sun-Times*, *St. Louis Dispatch*, *Miami Herald*, *Atlanta Journal-Constitution*, *Baltimore Sun*, *Kansas City Star*, and *Philadelphia Tribune*, and also featured on at least 77 radio and television stations, including in major markets such as New York and Los Angeles. The poll’s findings were also reported by the *Atlantic*, “[Public Opinion Shifts in Favor of School Choice](#),” August 21, 2018, and by the *Wall Street Journal* editorial column, “[The School Choice Election Bonus](#),” November 13, 2018.

As of the year-end 2019, *Education Next* had 143,618 Twitter followers and an email list of 6,767. Our website had 2,072,249 pageviews in 2019, 1,606,376 visits, and 1,373,167 unique visitors. In each of the first four months of 2020, our podcasts were played at least 9,000 times.

The journal's work has continued to command substantial attention in the current calendar year. In January 2020, [NBC News drew from the annual *Education Next* poll of public opinion](#) to explain how teacher salaries will factor into the 2020 election. In March 2020, *Education Next* senior editor Paul E. Peterson published an [op-ed](#) in the *Wall Street Journal* bringing evidence to bear on then-presidential candidate Bernie Sander’s praise of the Cuban education system. In April 2020 amid uncertainty over coronavirus-related learning loss, the editorial board of the [New York Times cited](#) *Education Next* research on learning loss. The same study [appeared](#) in the *Philadelphia Inquirer*. Other *Education Next* editors have also recently published op-eds in outlets from the [Washington Post](#) to [Forbes](#). The Institutes of Education Sciences at the U.S. Department of Education also recently [cited](#) an *Education Next* blog post discussing testing and accountability during the coronavirus pandemic.

Education Next internet traffic, as measured by pageviews in Google Analytics, is up 13% in 2020 as of April 2020 over 2019, an increase of about 97,000 pageviews.

The Proposal

We are starting from a strong position, with world-class talent and a track-record of achievement.

A certain level of continued funding would maintain our program and journal at our current levels of productivity, which we’ve been able to accomplish thanks to the generous support of the Charles G. Koch Foundation over the years 2015 through 2020.

A grant of roughly \$2.65 million over five years would keep the program operating at its current lively levels. It would pay for Master's and postdoctoral fellows; for events and the program's well-attended on-campus Colloquium Series; for the *Education Next* journal and website; for academic and professional leadership and staff; and for other expenses such as rent. In particular, because teaching and mentorship has been central to PEPG's mission, we are excited to propose continued support for the Education Entrepreneur fellowship program. Over the proposed grant period, three such fellowships will be offered. During the same period, 10 other Master's fellowships will be supported thanks to the generosity of other donors (Mark H. Dalzell Graduate Fellowship Fund). The total number of Master's fellowships supported through PEPG during the performance period of the proposed grant reaches 17 when considering previous fellowship support provided through other gifts to student who will be concluding their degree program during the proposed grant. While we expect to allocate most fellowships to Harvard Kennedy School students, qualified students interested in educational entrepreneurship who matriculate at the Graduate School of Education would also be eligible to apply. These are two-year, half-tuition fellowships, so funding three means selecting a new fellow during years two through four. In the most recent year, we received 160 applications for the available slots. We also propose to continue to attract postdoctoral research fellows. These one-year fellowships, renewable if appropriate, are awarded to early-career scholars with demonstrated interest in education entrepreneurship policy research and practice.

We'd be thrilled to continue at this level. The entire program as currently constituted has a staff of four full-time permanent employees in addition to the director and deputy director, who of course have teaching and administrative responsibilities as members of Harvard's faculty. Those staff comprise of associate director for the program and managing editor, assistant managing editor, and web editor of *Education Next*. The program director and deputy director, respectively, also function as senior editor and editor-in-chief of *Education Next*.

Budget

Executing this proposal will require resources of \$2,650,000 over five years starting on July 1, 2020 and ending on June 30, 2025, as documented in the budget that follows this proposal. We would request that these funds be awarded to Harvard University to support the core operations of the Program on Education Policy and Governance.

Accelerating the Pace of Education Reform Budget		Year 1	Year 2	Year 3	Year 4	Year 5	Years 1-5
Academic Year		2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2020-2025
Teaching and Mentorship							
Masters Fellows (3 Education Entrepreneur Fellowships w/half tuition carried between years)		\$0	\$26,965	\$55,008	\$56,108	\$28,615	\$166,696
Postdoctoral Fellow (1 postdoc years 1-4)		\$75,000	\$75,000	\$75,000	\$75,000	\$0	\$300,000
Postdoc Benefits		<u>\$19,725</u>	<u>\$19,725</u>	<u>\$19,725</u>	<u>\$19,725</u>	<u>\$0</u>	<u>\$78,900</u>
		\$94,725	\$121,690	\$149,733	\$150,833	\$28,615	\$545,596
Conferences and Seminar Series							
Conferences		\$30,000	\$30,000	\$0	\$0	\$0	\$60,000
Speakers (5 speakers per term year)		\$4,000	\$4,000	\$4,100	\$4,250	\$4,250	\$20,600
Event Expenses		\$400	\$500	\$500	\$500	\$500	\$2,400
Catering		\$2,119	\$4,500	\$4,500	\$4,500	\$4,500	\$20,119
		\$36,519	\$39,000	\$9,100	\$9,250	\$9,250	\$103,119
HKS Academic Visitors							
Visiting Faculty (5 visitors)		\$55,600	\$42,000	\$42,250	\$42,500	\$42,750	\$225,100
Administrative Resources and General Support							
Personnel: Salary and Benefits							
Director and Senior Editor		\$16,495	\$16,907	\$0	\$0	\$0	\$33,403
Deputy Director and Editor-in-Chief		\$0	\$0	\$12,888	\$13,210	\$0	\$26,097
Associate Director for Operations (50% years 1-5)		\$59,355	\$60,839	\$62,360	\$63,919	\$65,517	\$311,988
Managing Editor (50% years 1-5)		\$66,934	\$68,608	\$70,323	\$72,081	\$73,883	\$351,828
Assistant Managing Editor (50% years 1-5)		\$42,977	\$44,052	\$45,153	\$46,282	\$47,439	\$225,902
Web Editor (50% years 1-5)		<u>\$50,493</u>	<u>\$52,109</u>	<u>\$53,776</u>	<u>\$55,497</u>	<u>\$57,273</u>	<u>\$269,149</u>
		\$236,254	\$242,514	\$244,499	\$250,988	\$244,111	\$1,218,367
Administrative costs							
Other (Office space costs/rent and facilities)		\$37,477	\$39,351	\$41,318	\$43,384	\$45,553	\$207,084
SUBTOTAL: Direct Costs Exempt from Overhead (Fellows)		\$94,725	\$121,690	\$149,733	\$150,833	\$28,615	\$545,596
SUBTOTAL: Direct Costs Subject to Overhead		\$365,850	\$362,865	\$337,168	\$346,122	\$341,665	\$1,753,670
Overhead @ 20%		\$73,170	\$72,573	\$67,434	\$69,224	\$68,333	\$350,734
Budget Yearly Totals		\$533,745	\$557,128	\$554,334	\$566,180	\$438,613	\$2,650,000
* PEPG will carry 10 additional fellows between years 1-5 through the Mark H. Dalzell Graduate Fellowship Fund							

Appendix A

Summary of Recent Activities

Academic Visitors

The following visitors taught courses with Professor Paul Peterson in the fall of 2019:

Michael Horn, Co-founder and Distinguished Fellow, The Christensen Institute
Richard Komer, Senior Litigation Attorney, Institute for Justice
Robert Pondiscio, Senior Fellow and Vice President for External Affairs, The Fordham Institute
Michelle Rhee, former Chancellor of the Washington, D.C. public schools
Paymon Rouhanifard, former Superintendent of Camden Public Schools, New Jersey
Andreas Schleicher, Special Advisor on Education Policy to the Secretary General, Director for Education and Skills, Organisation for Economic Co-operation and Development
Erica Suares, Senior Policy Advisor, Majority Leader of the U.S. Senate (McConnell)

The following visitors have committed to teaching courses with Professor Paul Peterson in the fall of 2020:

Alberto Carvalho, Superintendent, Miami-Dade County Public Schools
Wayne D. Lewis, Dean, School of Education, Belmont University and former Commissioner of Education for the Kentucky Department of Education
Joseph Olchefske, former Superintendent of Seattle Public Schools
George Parker, former President, Washington, D.C. Teacher's Union
Susan Patrick, President & Chief Executive Officer, Aurora Institute (formerly International Association for K-12 Online Learning – iNACOL)
Michelle Rhee, founder of StudentsFirst (and former Chancellor of the Washington, D.C. public schools)
Rocco Testani, co-leader of Eversheds Sutherland with extensive experience representing state and local government officials across the nation in school finance matters
Kate Walsh, President of the National Council on Teacher Quality

Fellowships

The following individuals were granted fellowships through the Program on Education Policy and Government for the 2019–20 academic year:

Postdoctoral Research Fellows

David Houston, PhD, Columbia University
Mohammed Danish Shakeel, PhD, University of Arkansas

Doctoral Research Fellows

Benjamin Arold, ifo Institute (Munich)
Tyler Simko, Government

Education Entrepreneur - Master's program

Samantha Batel, MPP

Ryan Brellenthin, MPP

Elizabeth Coffin-Karlin, MPP/JD at Harvard Law School (Joint)

Elizabeth Gibbons, MPA, Mid Career Program

Daniela Jozic, MPA

Priyanka Kaura, MPP

Zachary Martinez, MPP/JD at Georgetown University Law Center (Joint)

Chuck Nadd, MPP

Bin Xie, MPA/MBA at Wharton School of the University of Pennsylvania (Joint)

Colloquium Series

The following researchers and scholars participated in the PEPG Colloquium Series in 2018. The colloquia are lunchtime seminars open to the public in which experts present recent research findings.

Michael Horn, Co-Founder and Distinguished Fellow, The Christensen Institute,
Choosing College: How to Make Better Learning Decisions Throughout Your Life

Paul Peterson, Henry Lee Shattuck Professor of Government, Harvard University,
Results from the 2019 EdNext Poll

Paymon Rouhanifard, Co-Founder and CEO of Propel America, *District Turnaround: Politics & Community Engagement*

Richard Komer, former Senior Litigation Attorney, Institute for Justice, *Espinoza v. Montana Department of Revenue: The Next Step*

Erica Suarez, Senior Policy Advisor, Office of the Senate Majority Leader, U.S. Congress, *Policy, Politics, and Process: Legislating in the United States Congress*

Andreas Schleicher, Special Advisor on Education Policy to the Secretary General, Director for Education and Skills, OECD, *World Class: How to Build a 21st-Century School System*

Robert Pondiscio, Senior Fellow and VP for External Affairs, The Fordham Institute, *How the Other Half Learns: Equality, Excellence, and the Battle over School Choice*

Leslie Finger, Harvard University, *Shifting Alliances in State Political Parties: The Case of Education Interest Groups*

Allison Atteberry, Colorado University-Boulder School of Education, *The Effects of Full-Day Prekindergarten: Experimental Evidence of Impacts on Children and their Families*

Melanie Rucinski, Harvard Kennedy School, and Joshua Goodman, Brandeis University, *Racial Diversity in the Teacher Pipeline*

Benjamin Arold, University of Munich and **Dany Shakeel**, Harvard Kennedy School, *The Effect of Common Core on Student Achievement: Evidence from Two Large Scale Assessments*

Events in support of *Education Next* research

Tuesday, May 22, 2018

Are State Proficiency Standards Falling? A New Analysis using the Latest NAEP Data, Hoover Institution, The Johnson Center, Washington, D.C.

- **Martin R. West**, Harvard Graduate School of Education, moderator
- **Paul E. Peterson**, Harvard University, panelist
- **Catherine Brown**, Center for American Progress, panelist
- **Candice McQueen**, Tennessee Department of Education, panelist
- **Robert Pondiscio**, Thomas B. Fordham Institute, panelist

Tuesday, April 8, 2019

Have We Closed Socioeconomic Achievement Gaps?, Hoover Institution, The Johnson Center, Washington, D.C.

- **Martin R. West**, Harvard Graduate School of Education, moderator
- **Eric A. Hanushek**, Hoover Institution, presenter
- **Isabel Sawhill**, Brookings Institution, panelist
- **Emma Vadhera**, Next100, panelist

Thursday, November 21, 2019

U.S. Supreme Court Case – *Espinoza v. Montana Department of Revenue*, Harvard Kennedy School

- **Paul E. Peterson**, Harvard University
- **Kendra Espinoza**, Plaintiff
- **Erica Smith**, Institute for Justice
- **Michael Gilleran**, FisherBroyles

PEPG Conferences

Thursday, April 19, 2018

Learning from the Long-term Effects of School Choice in America, Harvard Kennedy School, Cambridge, MA

- **Steve Snyder**, The 74, panel chair
- **Matthew Chingos**, Urban Institute, paper author
- **Julian Betts**, University of California, San Diego, paper author
- **Anna Egalite**, North Carolina State University, discussant
- **John Kirtley**, Step Up For Students, discussant
- **Derrell Bradford**, 50CAN, panel chair
- **Patrick Wolf**, University of Arkansas, paper author
- **Michael McShane**, EdChoice, discussant
- **Martin R. West**, Harvard Graduate School of Education, discussant
- **Chris Stewart**, Wayfinder Foundation, panel chair
- **David Sikkink**, University of Notre Dame, paper author
- **Paul E. Peterson**, Harvard University, paper author
- **Darrell Allison**, American Federation for Children, discussant
- **Robert Pondiscio**, Thomas B. Fordham Institute, discussant
- **Scott Jensen**, Chartwell Strategic Advisors, panel chair
- **Albert Cheng**, Harvard Kennedy School, paper author
- **Brian Gill**, Mathematica Policy Research, paper author
- **Jim Stergios**, Pioneer Institute, discussant

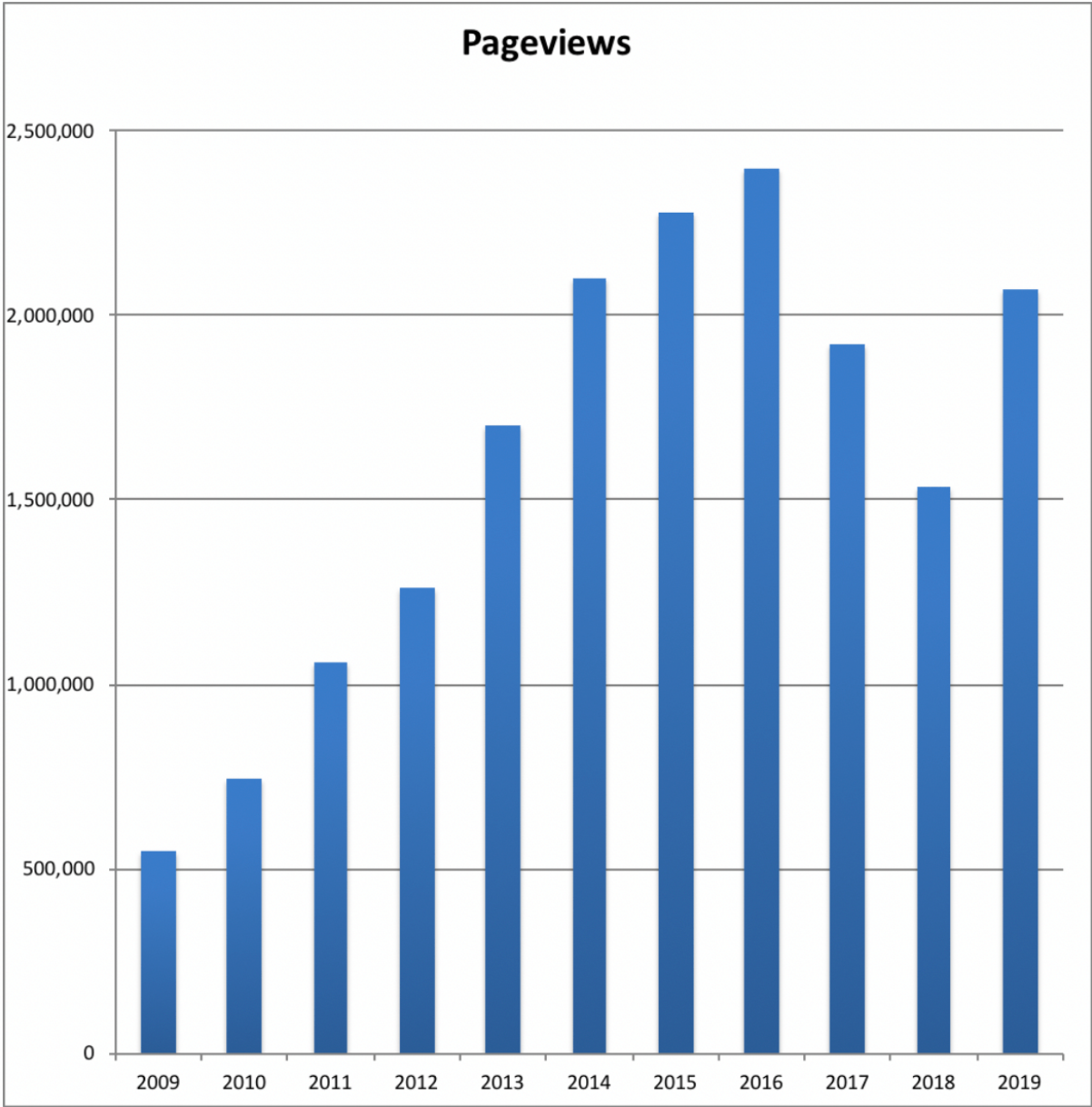
- **Emmerich Davies**, Harvard Graduate School of Education, discussant

Tuesday, May 6 — Wednesday, May 7, 2019

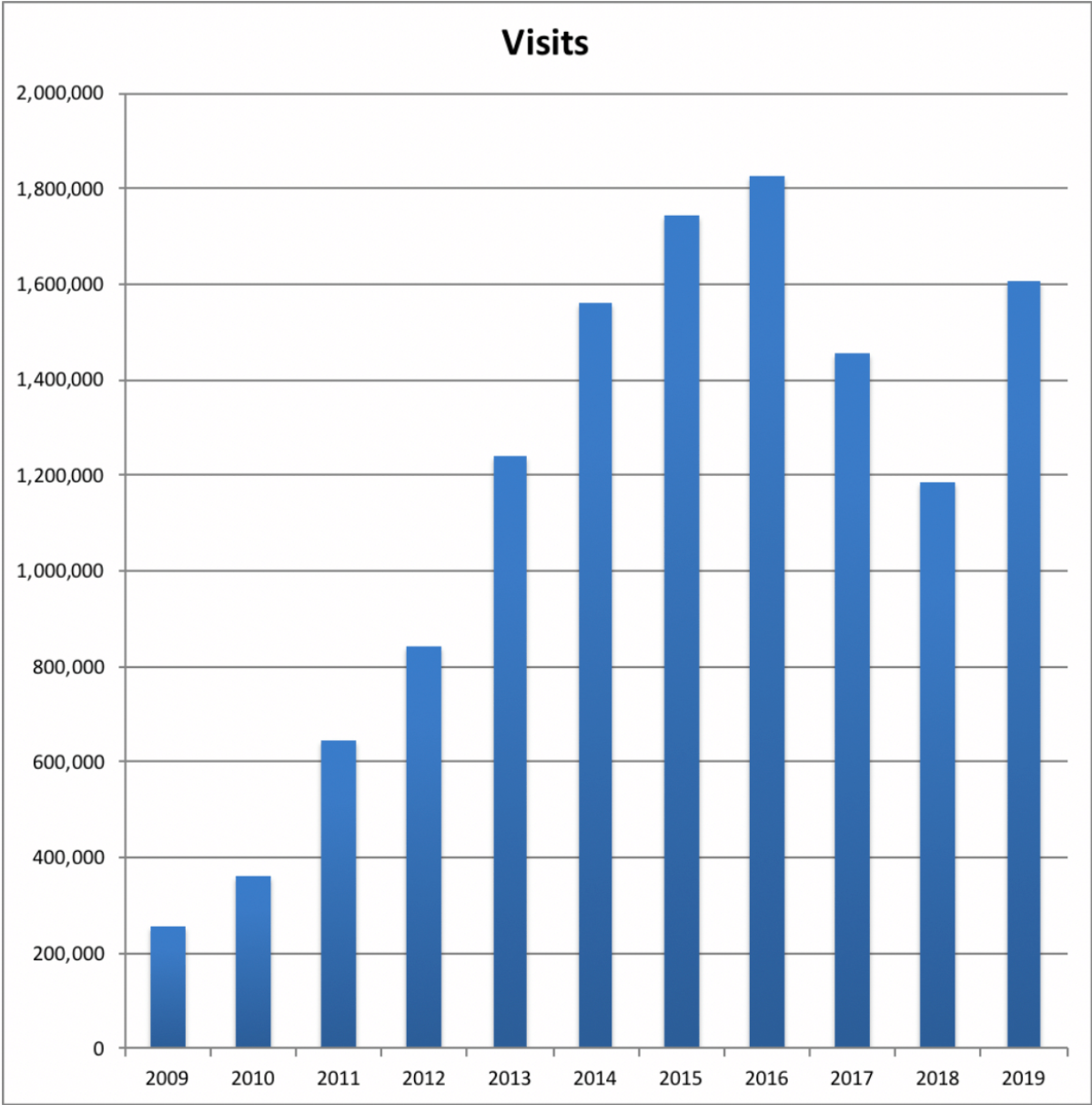
Education Cities: A Decade of Education Reform in American Cities , Harvard Kennedy School, Cambridge, MA

- **Jeffrey Liebman**, Harvard Kennedy School, panel chair
- **Kristin Blagg**, Urban Institute, paper author
- **Edward Glaeser**, Harvard University, paper author
- **Tyler Simko**, Harvard University, paper author
- **Joshua Goodman**, Harvard Kennedy School, discussant
- **Anna Egalite**, North Carolina State University, discussant
- **Jason Bedrick**, EdChoice, panel chair
- **Michael McShane**, EdChoice, paper author
- **Josh Dunn**, University of Colorado, Colorado Springs, discussant
- **Beth Hawkins**, The 74 Million, discussant
- **James Blew**, U.S. Department of Education, keynote speaker
- **Nina Rees**, National Alliance for Public Charter Schools, panel chair
- **Thomas Toch**, FutureEd, paper author
- **Doug Harris**, Tulane University, paper author
- **Michelle Rhee**, StudentsFirst, discussant
- **Beth Schueler**, University of Virginia, discussant
- **Rob Enlow**, EdChoice, panel chair
- **Ron Matus**, Step Up For Students, paper author
- **Julie Marsh**, University of Southern California, paper author
- **Susan Bush-Mecenas**, Northwestern University, paper author
- **Bryan Hassel**, Public Impact, discussant
- **Sarah Reckhow**, Michigan State University, discussant
- **Derrell Bradford**, 50CAN, panel chair
- **Alan Borsuk**, Marquette University, paper author
- **Katrina Bulkley**, Montclair State University, paper author
- **Kate Meza Fernandez**, Montclair State University, paper author
- **Deborah McGriff**, frmr. Managing Partner, NewSchools Venture Fund, discussant
- **Paymon Rouhanifard**, Propel America, discussant
- **Stephen Goldsmith**, Harvard Kennedy School, panel chair
- **Parker Baxter**, University of Colorado, Denver, paper author
- **Paul Teske**, University of Colorado, Denver, paper author
- **Robin Lake**, University of Washington Bothell, paper author
- **Tom Boasberg**, frmr. Superintendent, Denver Public Schools, discussant
- **David Harris**, City Fund, discussant

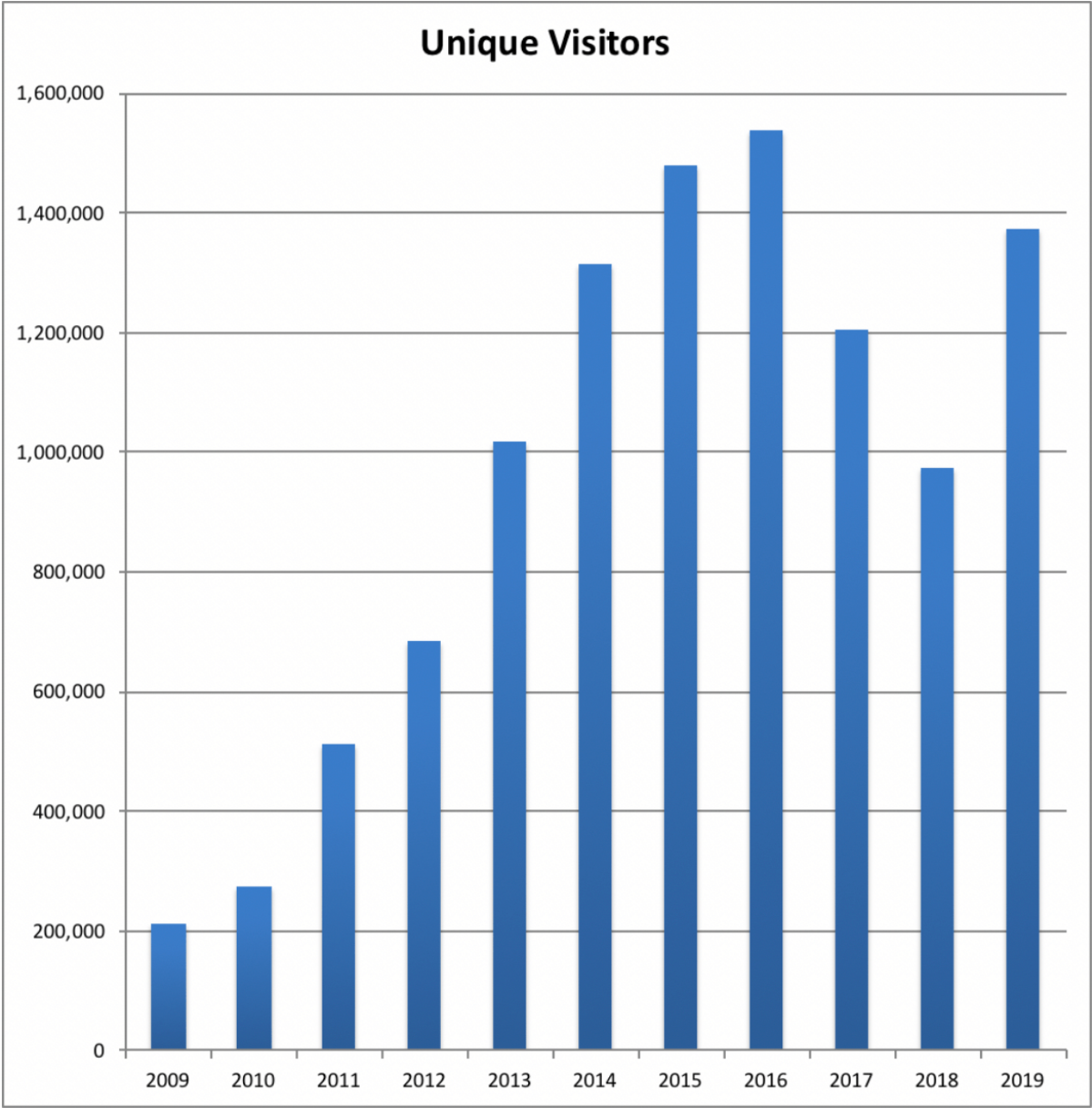
Appendix B: *Education Next* Website and Media Statistics



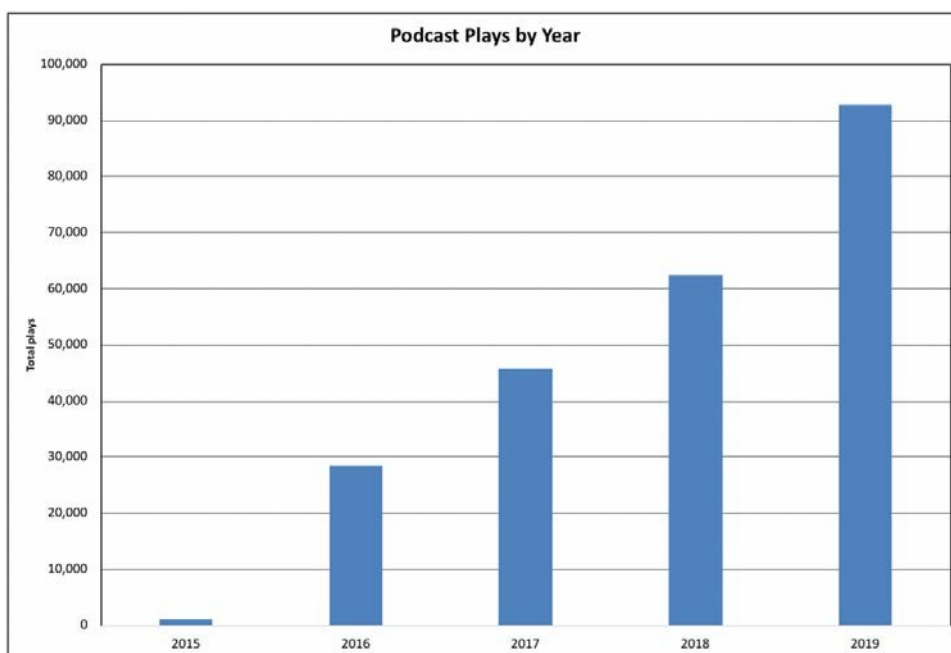
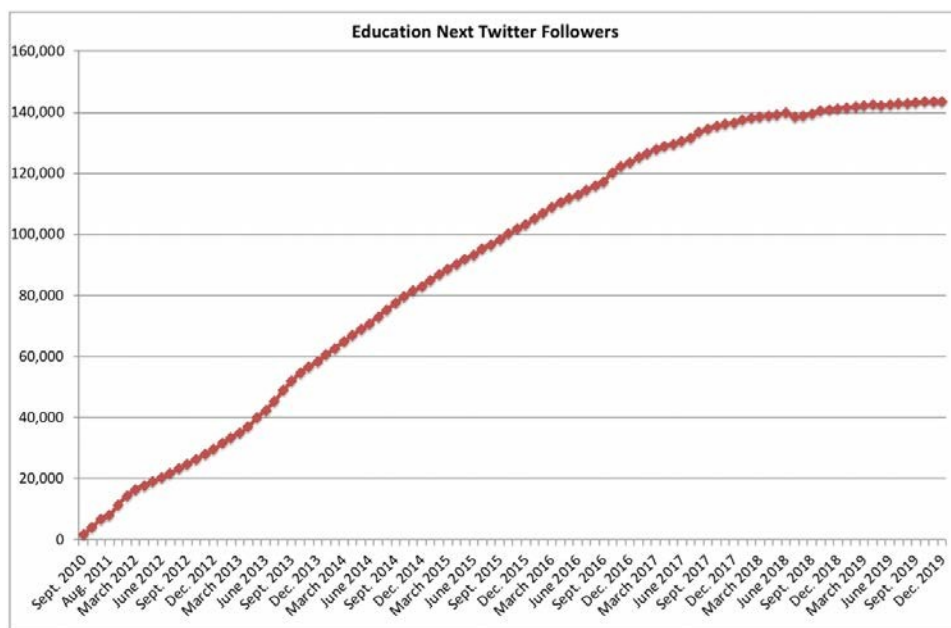
Source: Google Analytics



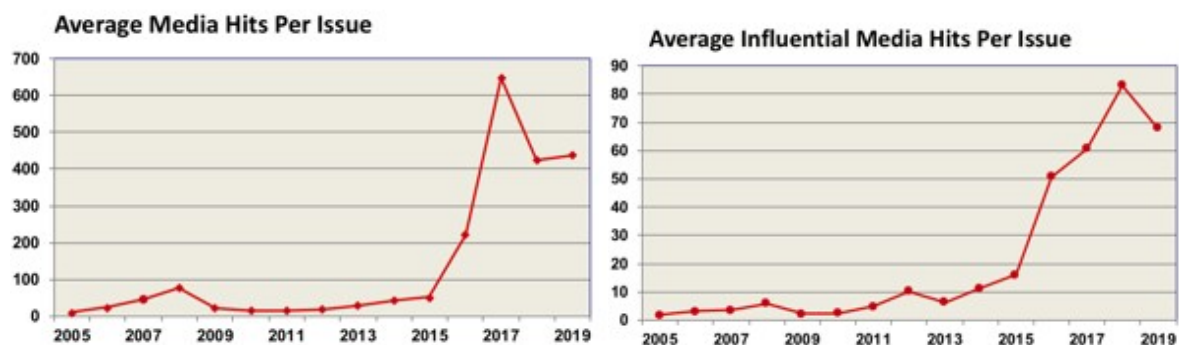
Source: Google Analytics



Source: Google Analytics



Media Coverage



	All Media	Influential Media	Total Media and Blog Hits
2013	118	25	478
2014	175	45	650
2015	206	64	486
2016	665	152	1076
2017	1943	182	2350
2018	1273	249	1626
2019	1315	204	1580

Influential Media is defined as top 30 newspapers ranked by highest circulation and the top 30 magazines ranked by ad revenue (both print and online versions of these publications are included.) Encompasses articles, radio, and television. This category also includes influential education trade media, including *Education Week*, *The 74 Million*, and *Chalkbeat*.