

# Report on 2016 Direct Charitable Activities

Direct charitable activities (DCAs) are philanthropic activities that the foundation engages in directly, rather than by making grants to grantees. Under IRS regulations, the expenses associated with DCAs count as part of a foundation's qualifying distributions and must be reported annually on IRS Form 990-PF.

In 2016, foundation-wide expenses for DCAs totaled \$8,507,356 for 117 projects. This is a 30 percent increase in total dollars since last year and a 2 percent increase in the number of projects. The most common uses of DCAs were conducting research, convening conferences, providing technical assistance to grantees, and disseminating research findings. The foundation also celebrated its 50th anniversary in 2016. This report provides details of DCA expenses by program and describes DCA projects with expenses greater than \$100,000.

**Program: Cyber**  
**Active Projects: 3**  
**DCA Expenses: \$189,966**

**Program: Education**  
**Active Projects: 54**  
**DCA Expenses: \$3,681,607**

## ***2016 Deeper Learning Grantee Meeting (\$234,674)***

To conduct the Deeper Learning Grantee Meeting, provide technical advice, and promote information sharing between grantees and other charitable organizations and to publish and disseminate to the education community and the public, results of reports and research that show how deeper learning is an attainable and necessary goal for students.

## ***Deeper Learning Communications Strategy for the field (\$118,200)***

Hattaway (consultant) shall design a communications strategy for the advocates, funders, and practitioners in the field of deeper learning to promote deeper learning outcomes in U.S. schools.

## ***EdCounsel 2016 Policy Framework to Advance Deeper Learning (\$424,800)***

Consultant shall assist the Hewlett Foundation and its core grantees to expand capacity to identify, define, support, field build, position, and advance deeper learning policies across a range of national, state, and local reform opportunities that leverage ESSA and related reforms, including a focus on achieving specific measurable objectives.

## ***Education Travel and Learning Fund 2016 (\$141,333)***

The Education Travel and Learning Fund (Education-TLF) was created to promote greater cross-regional learning and exchange among grantees working in diverse sectors and world regions. To achieve this goal without creating an administrative burden to foundation staff, the Institute for International Education will assume much of the financial, administrative and logistical support functions for travel and learning activities.

## ***ISKME 2016 OER Grantees Conference (\$142,534)***

The Institute for the Study of Knowledge Management in Education (ISKME) shall host, coordinate, and facilitate the annual OER Grantees Meeting to advance the field of OER. Participants will include Hewlett Foundation OER grantees, field experts, and enthusiasts.

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## ***GETTING SMART Interactive Publications and Blog Series (\$182,669)***

Consultant shall propose a trilogy of interactive publications and a corresponding thought leadership blog series to support grantees' goals to spread deeper learning outcomes. The project will include three main focus areas: 1) Learn: preparing students for a project-based world; 2) Teach: preparing teachers for a project-based world; and 3) Lead: preparing leaders for a project-based world.

## ***Global Book Alliance to Deploy OER and Improve Education Around the World (\$165,000)***

Redstone will support the GBA to create several working groups including a design group to spearhead detailed discussions on the GBA; a funders group that will include other funders, as well as private sector partners; and a series of technical group to concentrate on key topics (e.g. open licensing, supply chain logistics, procurement policies). By the end of the first phase the GBA should have a clear goal and well defined process to prepare for a launch and fully functional groups.

## ***Redstone Deploying OER to Improve Education in Developing Countries (\$108,900)***

Consultant shall assist the Education Program to develop a strategy for the OER movement to improve education in developing countries, including the following: 1) conduct a preliminary scan of opportunities; 2) outline a grantmaking strategy for an early childhood literacy pathway and assess its feasibility; 3) draft a preliminary grantmaking strategy; and 4) continue to support OER grantmaking and ZTC Degree through strategic counsel.

## ***The Buck Institute for Education to advance the Deeper Learning movement (\$100,000)***

The Buck Institute for Education will actively participate in the greater education community nationwide to expand the reach of project-based learning and the DL movement. The Institute will consult and collaborate with grantees and other experts in the field, develop written materials on DL through project-based learning, and attend meetings and conferences in support for DL.

## ***WestEd analysis of the impact of High Quality Instructional Materials to Deeper Learning grantees (\$220,000)***

WestEd will work with the HQIM cluster of deeper learning grantees to provide an analysis of both the supply and demand for HQIM. The cluster grantees will receive ongoing feedback in support of their implementation goals. The intent is to enable the cluster grantees to work more efficiently by receiving and consulting on frequent feedback cycles.

**Program: Environment**

**Active Projects: 9**

**DCA Expenses: \$482,702**

## ***Climate Change Initiative 2016 (\$214,940)***

To promote responsible energy development to include fuel efficiency and air quality, and to address global climate change, by hosting conferences and meetings with experts in the field to discuss climate change and global warming issues.

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## **Program: Global Development and Population**

**Active Projects: 10**

**DCA Expenses: \$ 1,348,203**

### ***Catalysts for Change: Determining scope and structure for an Advocacy Lab to advance in-country advocacy capacity (\$300,000)***

Consultant shall undertake the design work for an Advocacy Lab that provides advocacy practitioners with opportunities for engagement, learning, and access to expertise and resources to advance in-country advocacy capacity in the reproductive health field.

### ***Catalysts for Change: Determining scope and structure for an Advocacy Lab to advance in-country advocacy capacity (\$770,000)***

The Advocacy Accelerator will strengthen advocacy capacity, alignment, and impact in the Global South by providing online and in-person platforms for advocates and their supporters to share experiences, evidence, and approaches. Key activities will include: (1) Educate donors and partners about the Advocacy Accelerator through engagement activities at the Women Deliver conference in Copenhagen Denmark, we well as group and individual consultations; (2) Submit a report outlining recommendations for hosting, staffing and supporting an East African Advocacy Accelerator by collecting information from host applicants and the assessments Accelerator Advisory Committee members; (3) Provide a pipeline of proposed in-person advocacy exchange events by collecting and assessing ideas and advising on prioritization; and (4) Manage and test the design and use of an online knowledge management platform by engaging with advocates through the Accelerator Facebook group, collecting and prioritizing content to be shared through the platform, and collaborating with the designer to develop and test an online mechanism to share the information gathered.

## **Program: Madison**

**Active Projects: 4**

**DCA Expenses: \$374,186**

### ***2016 Madison Grantee Convening (\$192,936)***

The convening will bring together over 90 nonprofit leaders, advocates, academic political scientists, funders, and consulting partners working to improve representative democracy in the United States. Over the course of three days, participants will be encouraged to build connections, explore representative democracy from different angles and vantage points, and explore new, innovative ideas about ways to improve the democratic process.

### ***Center for Evaluation Innovation: Madison Initiative Evaluation (\$165,000)***

The evaluation will cover the Madison Initiative's first phase of "experimentation, learning, and field building." The evaluation aims to support ongoing learning that will help the foundation as well as grantees, funding partners, and field observers make sense of their work and how to improve it.

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**Program: Performing Arts**  
**Active Projects: 12**  
**DCA Expenses: \$496,080**

***2016 Arts Leadership Initiative (\$128,129)***

To provide professional and leadership opportunities to support leaders in California's nonprofit arts sector, including meetings, gatherings, conferences, and workshops.

***Original work by Sarah Jones addressing the field of philanthropy (\$200,000)***

For the creation of an original performance piece to be premiered at the Hewlett Foundation's 50<sup>th</sup> anniversary symposium. The general theme of the piece is related to philanthropy and will be suitable to be performed in other venues and the public.

**Program: Philanthropy**  
**Active Projects: 8**  
**DCA Expenses: \$417,784**

***Evaluation Matching Funds 2016 (\$211,502)***

The Evaluation Matching Funds will support a number of evaluation projects that include the provision of expert technical advice and recommendations for increasing grantee accomplishments, which will be developed based on evaluation data and findings highlighting successes and challenges. Evaluation projects will also include sharing and discussion with grantees of findings and their implications as well as more formal publication and dissemination of the evaluation findings in an effort to inform practices in the respective fields more broadly.

**Program: Special Projects**  
**Active Projects: 17**  
**DCA Expenses: \$1,516,829**

***Hewlett 50<sup>th</sup> Anniversary Symposium (\$305,308)***

The Hewlett Foundation will mark its 50<sup>th</sup> anniversary with a symposium on today's social challenges. The December 2016 symposium at Stanford University will feature new research and candid discussion with leaders of foundations, nonprofits, businesses and government, as well as journalists, academics, and Hewlett staff and board members. Participants will examine 50 years of philanthropy and the social sector - what we have accomplished, what we have learned - and consider what's ahead. Topics will include key challenges and approaches to alleviate poverty, increase impact, and address power. Sessions will feature prominent speakers and active audience engagement. Symposium content will be shared on the Hewlett website, via social media, and on other platforms to reach a broader audience.

***Research on Philanthropy (\$366,241)***

The foundation is commissioning research on the changes in philanthropy over the last 50 years and the trends that will affect philanthropy in the future. Historians Benjamin Soskis and Stanley N. Katz will produce a monograph that surveys the philanthropic sector about the most significant changes that have shaped the sector in the last half-century. It will also examine the rise of the mega-foundations. Separately, the Center for Effective Philanthropy, through interviews with and surveys of foundation leaders, will conduct research to identify what foundation leaders consider to be the most pressing issues facing society, the preparedness of the philanthropic sector, and the most promising practices foundations might pursue.

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### ***TrueCost Initiative (\$350,000)***

The True Cost Initiative is a funder collaborative led by Bridgespan and the Ford Foundation with the Hewlett Foundation as a participant along with other foundations. The purpose of the initiative is to create collective research, learning insight and action regarding grantee cost structures, associated funding dynamics, the nonprofit starvation cycle and models of funding both direct and indirect costs. Ultimately this work will result in shared, scalable solutions that will support the best outcomes for the sector as a whole.

### ***Research assessing the financial and impact performance of program-related investments (\$168,000)***

Foundations have become increasingly interested in impact investing as a tool for furthering social impact while preserving financial capital. Yet data about the efficacy of this tool remains sparse. This project will gather and analyze empirical data on private foundation PRI performance over the last decade with the intent of giving current and future practitioners and broader marketplace participants a deeper understanding of such investments' performance, impact, and opportunity costs. This research will help to inform a forthcoming article on philanthropy and impact investing, which will be shared with audiences including foundation and philanthropic leaders, commercial investors, entrepreneurs, and policymakers/regulators.