



HISTORY OF THE  
*Performing Arts*  
*Program*

1966 to 2016

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## The William + Flora Hewlett Foundation History of the Performing Arts Program 1966 to 2016

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COVER PHOTO *A dancer with Alonzo King Lines Ballet* (RJ Muna)



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Folklorico dancers at the School of Arts and Culture at Mexican Heritage Plaza (Kathryn Rummel/ Rapt Productions)

## PREFACE

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Bill and Flora Hewlett established their foundation in 1966 with the express purpose of working for the betterment of humankind. Among their very first grants were awards to the San Francisco Symphony Association and KQED, because Bill and Flora knew that arts are essential for individuals to flourish and for vibrant, healthy communities. The arts express what is best in humanity. They challenge us to rethink limits, to feel deeply, and to comprehend our relationship with the world in new ways. The arts connect people with something larger than themselves, reaching us on a level beyond the purely rational. And, of course, the arts bring us together, forging bonds through the shared experience of a musical performance, a dance, or a play.

Support for the arts—and, for most of our history, the performing arts in particular—is in the Hewlett Foundation’s DNA. Indeed, our Performing Arts Program exemplifies many of our core commitments, such as our commitment to the use of long-term general operating support; to enabling grantees to chart their own course and trusting them to do so well; and to learning from experiences and adapting to meet changing needs and circumstances.

That last point emerges vividly in this history. For while our support of the Bay Area’s arts ecosystem is enduring, the particular forms it takes have evolved—and will continue to evolve—to meet the unceasing change that characterizes this dynamic region we call home.

### **Larry Kramer**

Hewlett Foundation President  
March 2017

## I. INTRODUCTION

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For fifty years, The William and Flora Hewlett Foundation has maintained a resolute commitment to the performing arts in the San Francisco Bay Area. The foundation was created in 1966 and began making grants in 1967. In its first full year of operation, the foundation gave \$70,000 to what was, at the time, called “arts and humanities.” The foundation awarded more than \$20 million by the Performing Arts Program in 2016.

What happened in between is the subject of this history.

This is not a history of the performing arts in the Bay Area, though, of course, the foundation’s support has been vital in helping many organizations grow, thrive, and present their artistic vision for the enjoyment of audiences across the region.

Nor is this a history of the foundation as a whole. For that the reader must seek elsewhere. But it is not possible to tell the story of the Performing Arts Program without paying close attention to the founders’ intentions and key decisions that shaped the foundation as a whole, particularly in its formative years.

Rather, it is the story of how William and Flora Hewlett’s generosity toward the arts was realized through decisions made by them and many other board and staff members over half a century. It is a story told so that other people who believe in the power of the arts to infuse life with meaning, value, and pleasure can understand how this commitment has evolved.



The San Francisco Symphony in the mid-1960s (San Francisco Symphony archive)

Some comparative data illustrate these points:

**PERFORMING ARTS  
PROGRAM PORTFOLIO  
IN 2016**



% General Operating vs. Project Support Grants



% Renewals vs. New Grants



% Multi-Year vs. One-Year Grants

A key influence on the Program’s development has been the relentless pressure of external change in the Bay Area over the past fifty years. In responding to these pressures, in a nuanced interplay, the Program has been shaped by them and has, in its turn, shaped the performing arts in the region by its responses. Over the years, the Hewlett Foundation has expanded dramatically from its local beginnings into a national, and even international, funder, whereas the focus of the Performing Arts Program has remained regional at heart. This fact has influenced the development of the Program in two essential ways.

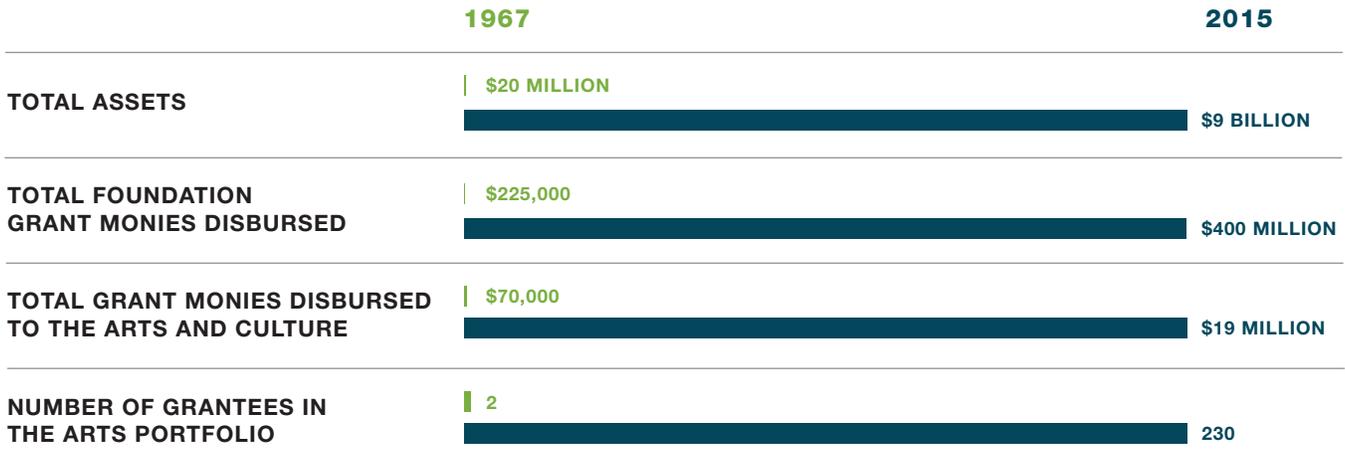
First, because the Program is rooted in local communities (“in our backyard,” according to one former program director), its administration maintains a high level of engagement, creating relatively intimate relationships with hundreds of grantees.<sup>1</sup> In addition to the volume of relationships called for by the size of the portfolio, budget size can influence the nature of those relationships. Even the largest cultural organizations have budgets that are considerably smaller than most grantees of other foundation programs—typically they’re less structured and undercapitalized. Consequently, institution-strengthening, articulated as one of the foundation’s early goals for grantmaking, has a markedly different flavor in the Performing Arts Program than most other programs.

The second implication is the predominance of general operating support, over extended periods of time, and the high rate of renewals to be monitored. Other foundation programs and initiatives, on average, manage considerably larger, more project-specific and short-term grants, and fewer renewals.

These statistics are of more than academic interest. While all the foundation’s programs evolve from the same DNA, the Performing Arts Program has successfully evolved in its own way to meet the needs of the unique and idiosyncratic field of the arts within, and consistent with, the larger purposes of the foundation. Understanding how that came about is the subject of this history.

<sup>1</sup> The foundation has historically required staff to be personally acquainted with the work of all grantees assigned to them, attending performances and making frequent site visits.

The quickest way to convey the scale of the evolution of the foundation over the past fifty years, and the Performing Arts Program within the foundation, is through numbers:



But a far more interesting way to tell the tale is to document the human side, the unfolding of the ideas, policies, and practices that emerged over the foundation’s fifty-year history of supporting the arts and humanities, to narrate the thoughts and actions of many dedicated people trying to be flexible and responsive to constantly changing times and circumstances.

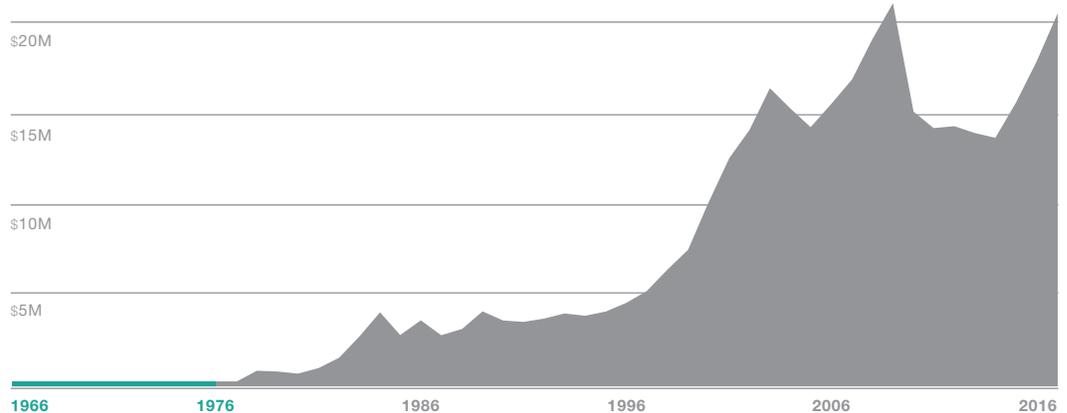
One of the unintended consequences of term limits for key foundation grantmaking personnel is that the foundation’s institutional memory resides in a number of different places. This history brings those perspectives together for the first time. It pieces together, from various sources, a quilt that represents both diversity and unity, bringing together the origins and early policies and practices—the foundation of the foundation, if you will—and subsequent adjustments to those early endeavors. Where possible, the actual words of the key players are used to express their ideas and recommendations.

To begin at the beginning.

## II. START-UP

1966 to 1976

TOTAL ARTS GRANTS	
1967	\$70,000
1968	\$10,000
1969	\$15,000
1970	\$10,000
1971	\$15,000
1972	\$10,000
1973	\$25,000
1974	\$25,000
1975	\$86,083
1976	\$157,322



William R. (Bill) Hewlett was raised and largely educated in the San Francisco Bay Area. He earned a degree in liberal arts from Stanford University, completed a master's degree in science at the Massachusetts Institute of Technology, and then returned to Stanford for a degree in electrical engineering.

In 1939, with \$538 borrowed from a Palo Alto bank, he and his close friend and Stanford classmate, David Packard, opened their first manufacturing operation in Packard's garage. Their product was an audio oscillator designed by Hewlett. In 1947, upon his return from Army duty, Hewlett-Packard Company was incorporated and became a pioneer and leader in the high-tech industry that would transform the Bay Area and the modern world.<sup>2</sup>

Two decades later, Hewlett and his wife, Flora Lamson Hewlett, who were already deeply involved in Bay Area philanthropy on a personal level, decided it was time to give back in a more systematic way, and, with the explosive success of Hewlett-Packard Company, they had the means to do it.

By any measure, in 1966 the institutional base for arts philanthropy in the San Francisco Bay Area was a sparsely populated landscape.

<sup>2</sup> Waldemar A. Nielsen, *Golden Donors: A New Anatomy of the Great Foundations* (New Jersey: Transaction, 2001) These and many other facts relating to the early years of the foundation come from Nielsen's book.



William R. (Bill) Hewlett

Performing arts were dominated by classical Western European art forms, notably the San Francisco Opera, San Francisco Symphony, and the San Francisco Ballet. The San Francisco Foundation had been around since 1948, but there were scarcely any other private or family foundations operating west of the Rockies at the time—certainly nothing to compare with the large, well-established, well-endowed foundations that had long been operating in major cities in the Eastern United States.

On the other hand, in the 1960s public sector funding for the arts was gaining traction on local, state, and federal levels, a development that fueled the furious growth of the field over the coming years. Specifically, in 1966, the visionary program, Grants for the Arts/San Francisco Hotel Tax Fund was five years old, the California Arts Commission was three,<sup>3</sup> and the National Endowment for the Arts had been established by an act of Congress only the year before.

The Hewletts were well aware of these facts. They were both passionate devotees of classical music and long-time supporters of the San Francisco Symphony in particular. (This interest was intergenerational. Flora Hewlett's mother regularly attended both the San Francisco Symphony and the San Francisco Opera.) And Bill Hewlett had served for ten years on the Distribution Committee, the grantmaking body of The San Francisco Foundation.



A 1960s jazz performance on KQED (KQED)

<sup>3</sup> Replaced by the California Arts Council in 1975.

With a deep appreciation of philanthropy, the Hewletts founded The William R. Hewlett Foundation in late 1966.<sup>4</sup> To meet the requirements of California State law, they asked their twenty-one-year-old son, Walter B. Hewlett, to serve as the third founding Board member. Walter remembers signing the incorporating documents at the coffee table in the Hewlett family living room. By design, Hewlett intended it to be a family foundation, in the sense that he and his wife would direct its work, along with their three sons and two daughters, to the extent they were interested. From 1966 to 1972 the foundation was run out of Hewlett's corporate offices with the help of his secretary.

Initially, Hewlett endowed the foundation with \$20 million in Hewlett-Packard stock. Grants went to the purposes the Hewletts were interested in, and the three founding areas of interest have continued to the present without interruption. The first grants in 1967 were awarded in arts and humanities, education, and population. Total grants awarded in 1967 were \$225,000, of which arts and humanities grants totaled \$70,000—or approximately a third of the total grant funds awarded. The recipients of the two initial grants were the San Francisco Symphony and KQED.<sup>5</sup>

Things continued operating informally as a family foundation for several years, while the asset base of the foundation increased dramatically each year, and new areas of interest were added to (and occasionally subtracted from) the founding list. However, the grantmaking task was becoming too complex to be managed with the casual systems of its beginnings. By 1973 the Hewletts, to formalize operations, turned to John May, former director of The San Francisco Foundation, with whom Bill Hewlett had volunteered for a number of years.

The foundation moved out of Hewlett's corporate offices. The move to space outside the Hewlett-Packard complex underscored the foundation's separateness from the business, and part-time staff was hired. With May's help, the foundation's fields of primary interest were codified as: education, mainly at the university level; population issues; preservation of the environment; and arts and humanities. Preference in grantmaking would be given to the western part of the United States, with particular emphasis on the Bay Area.

<sup>4</sup> The name was changed to the William and Flora Hewlett Foundation in 1977.

<sup>5</sup> Only the San Francisco Symphony has been a grant recipient every year of the foundation's fifty-year history.



Support for American Conservatory Theater in San Francisco began in 1968. (ACT archive)

By this time, the Board had expanded to add the Hewletts' son James, but still consisted only of family members.<sup>6</sup> In 1975, again at May's recommendation—in a move that would have enormous impact on the future of the foundation—the Board changed from its family-directed origins to include two close friends, Robert Brown and Lyle Nelson. Brown was Mrs. Hewlett's attorney, and Nelson taught at Stanford. The Board's style remained informal. Meetings were held in the Hewlett living room, with spouses invited. Everyone discussed the proposals, spouses included.

This informality extended to the internal organization of what were still called “areas of interest,” rather than programs. Education, Population, and the Environment had program officers assigned to them, but the Arts and Humanities had no designated staff, and those grants were handled collectively by the other program officers.

This system worked to the disadvantage of the Arts and Humanities. While it had begun on roughly equal footing with Education and Population in terms of grants awarded, the other early focus of interest—Stanford University, Hewlett's alma mater—quickly moved to the level of annual million- or multi-million-dollar grants, which were unequaled by any other program. By 1975, grant disbursements for all programs had topped \$5.7 million (of which \$4.7 million was awarded to Stanford University). Among other things, this had an impact on the percentage of total grant funds allotted to Arts and Humanities, which declined from its early high of 31 percent in the first year of operation to a low of 1 percent in 1975.

By 1976, that percentage had rebounded slightly to 4 percent of total grant awards for the year, and the grantees reflected the family's interest in classical music, including training musicians. Of the eight Arts and Humanities grants awarded that year, six went to institutions focused on classical instrumental music, and of those six, three went to institutions devoted to education, through the training of musicians. The informality of grantmaking continued to the extent that there were no specific guidelines for the Arts and Humanities, and consequently, no pattern of grant awards, which were different from year to year with the exception of an annual gift to the San Francisco Symphony. Other organizations made occasional appearances with no particular consistency of cultural discipline or geography. For example, grants over this period were made intermittently to the American Academy of Arts and Sciences (Cambridge, MA), Wolf Trap Foundation (Vienna, VA), and the American Conservatory Theater (San Francisco, CA).

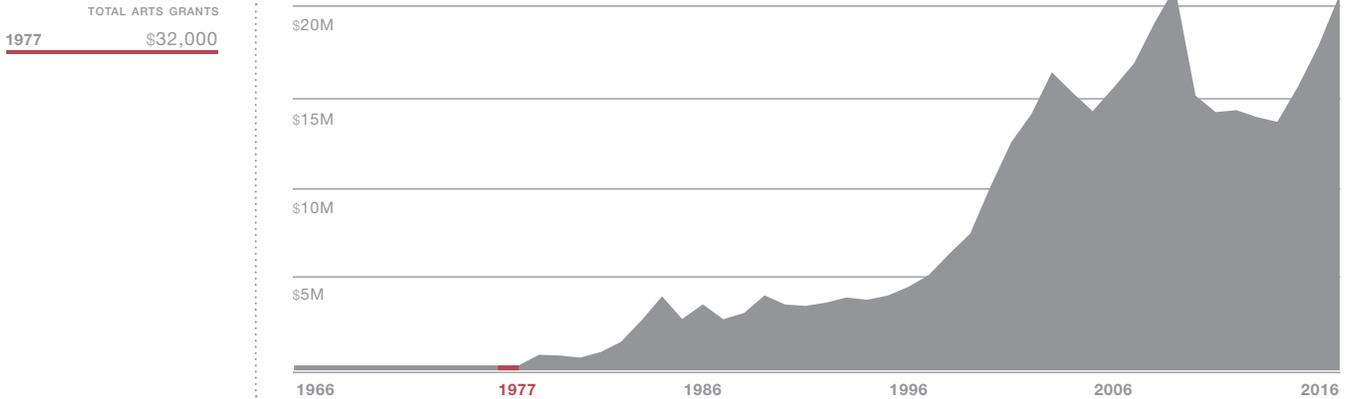
It became clear that, as the assets of the foundation continued to grow exponentially and the paperwork and internal pressures were increasing apace, further efforts were needed to professionalize what was becoming a more complex operation. John May's contributions were invaluable for the early stages of this process, but managing a local community foundation was a different order of magnitude from what The William R. Hewlett Foundation was fast becoming. In addition, the timing of events suggests the family may have known that a significant increase in the foundation's assets was approaching all too swiftly. Whatever their reasons, the Hewletts felt they needed a fresh perspective.

And they found, at Flora Hewlett's suggestion, the perfect man for the job.

<sup>6</sup> Since then, other sons and daughters of Bill and Flora have served on the Board, including Eleanor Gimon (1980–2013), Walter Hewlett (1966 to 2016), William Hewlett (1972–1981), James Hewlett (1972–1975), and Mary Jaffe (1990 to present).

### III. A WATERSHED YEAR

1977



Flora Lamson Hewlett, born and raised in Berkeley, graduated from the University of California, Berkeley, with a BA in biochemistry. After graduation she joined the Sierra Club, where she reconnected with a school friend, Louise Hewlett, who introduced her to her brother, Bill.

The Hewletts’ strong shared values made them a formidable philanthropic team. In addition to the important role she played in the early years of The William and Flora Hewlett Foundation, Mrs. Hewlett had a noteworthy reputation for community service in her own right. She sat on the board of trustees of Stanford University and the San Francisco Theological Seminary. She was a member of the executive committee of the World Affairs Council of Northern California, and served on the board of directors of California Tomorrow, an environmental nonprofit, among her other philanthropic interests.<sup>7</sup>

<sup>7</sup> In recognition of these many and varied philanthropic interests, her family established a family-run foundation in 1998—the Flora Family Foundation.



Flora and William Hewlett

As an alumna of the University of California, Berkeley, she maintained her interest in campus affairs, and had been particularly impressed by the performance of Dr. Roger Heyns, chancellor of the university during a notoriously tumultuous period, from 1966 to 1971. She was struck by how he won the trust of the students and restored a degree of order to the strife-torn campus. Heyns was now president of the American Council on Education in Washington, D.C., and was a perfect fit for what the Hewletts wanted—a person of national reputation to become the foundation’s first full-time president, to steer the course of what was obviously on its way to becoming a significant philanthropic endeavor of national, and even international, scope. Heyns was retained for the position.

But before his presidency could take effect, the untimely death of Flora Hewlett cast a pall. The family then changed the name of the foundation to reflect the important role Mrs. Hewlett had played in its founding and operations over its first decade. The new name would be The William and Flora Hewlett Foundation.

In addition the emotional impact of Flora Hewlett’s death, the foundation was confronted with the prospect of absorbing a significant increase in assets through her estate. The effect of Mrs. Hewlett’s bequest was enormous. In 1976, the total assets of the foundation were \$27 million. By 1979, once the estate was settled, assets had nearly doubled to \$50 million.

Despite arriving at a deeply sad time, Heyns moved swiftly to set the course for the newly named foundation. Within months of his arrival, he submitted to the Board of Trustees a document entitled “Policy and Procedures Memorandum to the Trustees,” or “the Memorandum.” This document took the existing interests of the founders and provided a philosophical framework of values that shaped the foundation at the most profound level. The Memorandum then moved beyond theory to outline a series of operating concepts that expressed those values, and that continue to undergird the work of the foundation to this day.

The Memorandum was prepared for Heyns’ first official Board Meeting. In it he articulated what he posited to be the purpose of philanthropy in general:

Implicit in these propositions is the belief that increasing the effectiveness of our democratic society is basic to human welfare, not just in the United States but in the rest of the world. Accordingly, the foundation will be especially sensitive to opportunities to improve the effectiveness of the institutions in our society, to assist in discovering solutions to problems that make the society less rewarding to its members.<sup>8</sup>

<sup>8</sup> Roger Heyns, “Policy and Procedures Memorandum to the Trustees” (1977).



Bill Hewlett and Roger Heyns at a Hewlett Foundation staff picnic at San Felipe Ranch around 1990 (Archie J. Brown)

This statement contains an idea that has proved fundamental to the foundation—the importance of building strong institutions as the means to improve human welfare. Within this larger context, he recommitted the foundation’s future to the Hewletts’ four founding areas of interest, codified by May’s earlier work. Of particular note for the Performing Arts Program is the order in which Heyns listed the areas of interest:

Among the many conditions that affect the human condition, the foundation has elected to concentrate its resources on the support of the arts and humanities, education, effective decision making in the management of man’s natural environment, and the field of population research and policy.<sup>9</sup>

Heyns took pains to further single out the arts and humanities with a rationale for its importance within the overall priorities of the foundation:

In support for activities in the arts and humanities, the foundation states its belief that a vigorous artistic intellectual life is essential to the full development of human potential.<sup>10</sup>

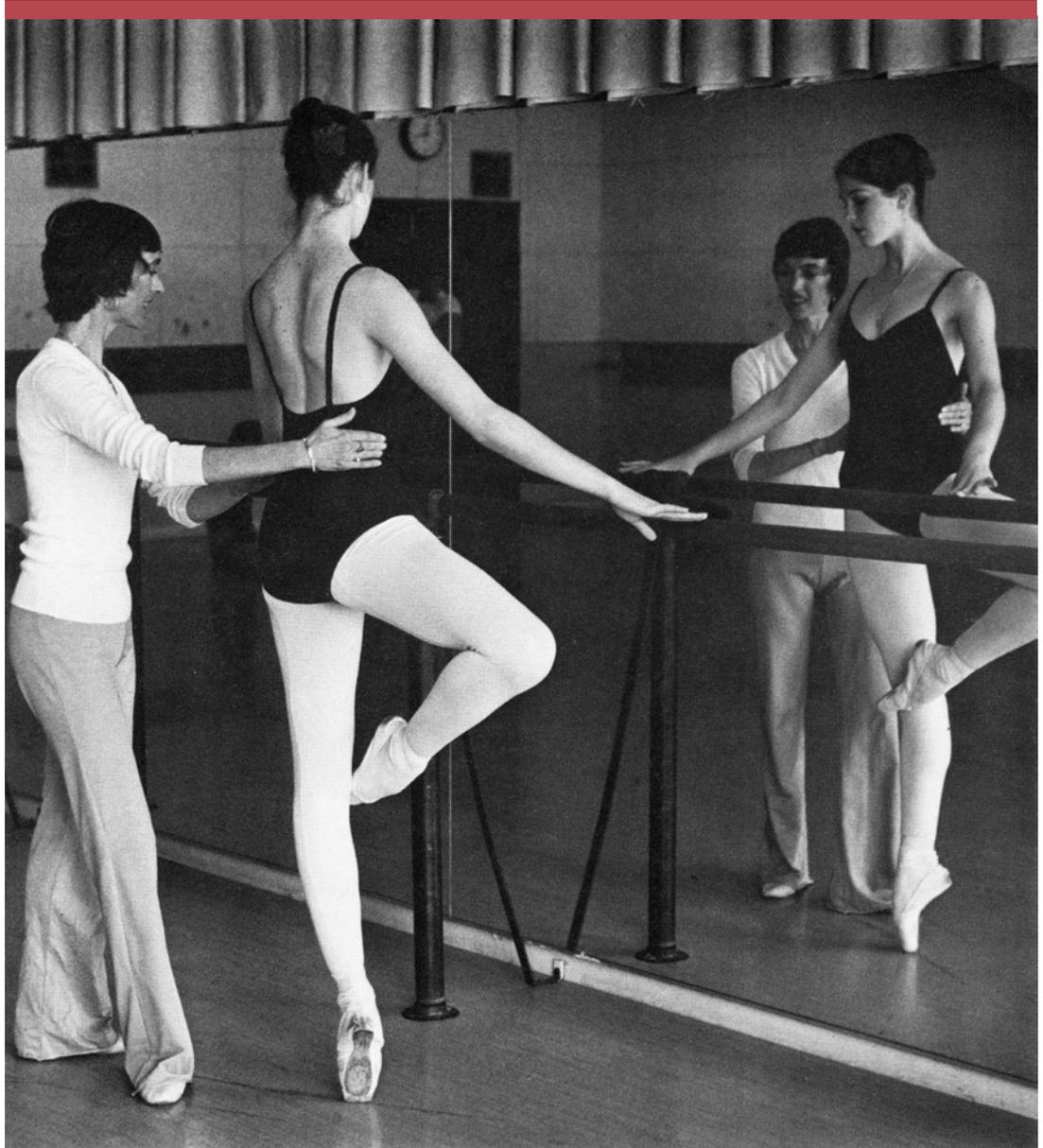
This is the earliest documented acknowledgment that the arts were different from other foundation areas of interest.

Despite its name, the “Policy and Procedures Memorandum to the Trustees” made few outright policy recommendations, using more conditional language suggesting Heyns’ preference for consensus, such as “a preference for” or “a tilt toward” a potential direction. The operating principles included:

- “A preference” for providing general operating support to support “institutions of excellence;”
- “A tilt toward” multi-year commitments, taking the long view by providing support over an extended period to relieve institutions of the burden of constant fundraising. (Or, as Heyns summarized these ideas: “Identify significant problems and sound projects, provide enough money over a long enough period to give them a real chance”);
- A recognition of the related importance of appropriate risk-taking in philanthropy;
- And the commitment to a small staff size, supplemented by work with specialists on a contract basis.

<sup>9</sup> Ibid.

<sup>10</sup> Ibid.



A dancer with San Francisco Ballet in the late 1970s (Hewlett Foundation archive)

However, the Memorandum did offer two policy recommendations relating directly to the arts and humanities:

- The annual allocation of approximately 10 percent of grant dollars to the arts and humanities, to stabilize its position with respect to the other areas of interest;
- The regional focus on San Francisco Bay Area arts and humanities because there were so few other arts funders west of the Rockies.

The Board approved all the operating principles and the two policies as a roadmap for moving forward, and, by the end of the year, the first guidelines for Arts and Humanities were made public in the 1977 *“Annual Report.”*

Up to this point, the Arts and Humanities grants had focused on classical instrumental music and music education, with occasional grants to theater and museums, as these were the areas of personal interest to the Hewletts. The guidelines made these interests explicit, specifying that the interest in museums was an educational one. Also, for the first time, the guidelines articulated the foundation’s interest in improving the management of arts organizations as a criterion for consideration for a grant, an interest that would expand over the years.

And finally, the “President’s Statement” summarized the Hewlett’s founding values as understood by the new president:

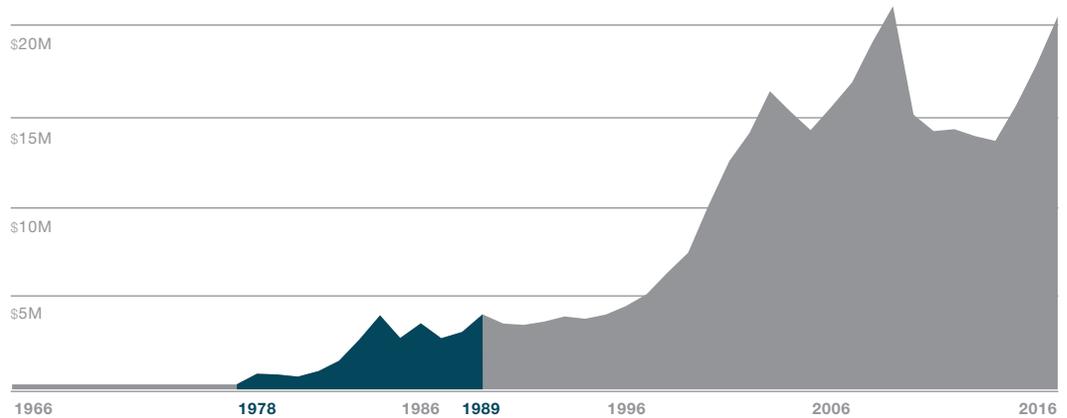
...to define programs and establish objectives that show promise of realizing the aspirations of the founders: to promote the well-being of mankind... It is especially important for us to take the long view, to work against current trends and immediate pressures when basic values are at stake. As broker and catalyst, the Hewlett Foundation wants to help others make the most of their knowledge, insights, and opportunities. The end, we hope, will be the intelligent choices that will bring about a society more rewarding to all its members... With a small staff, the Hewlett Foundation will consult widely and frequently, drawing heavily as it has in the past on the knowledge and experience of people working in other foundations, in government, and above all in the nation’s remarkable network of private institutions and associations. Within our resources, we will do all we can to ensure the continued vitality of that network, and in particular those institutions and associations within it of the highest accomplishment and most constructive influence.<sup>11</sup>

<sup>11</sup> The Hewlett Foundation, “Annual Report” (1977).

## IV. INNOVATION

### 1978 to 1989

TOTAL ARTS GRANTS	
1978	\$919,025
1979	\$843,102
1980	\$714,980
1981	\$955,229
1982	\$1,515,529
1983	\$2,770,000
1984	\$4,056,500
1985	\$3,047,000
1986	\$3,648,000
1987	\$2,807,000
1988	\$3,269,500
1989	\$4,075,000



The period between 1978 and 1989 was characterized by an abundance of experimentation and innovation in what would be renamed the Performing Arts Program, as well as by substantial growth. Twenty-one grants, totaling \$919,025, were awarded in 1978, increasing to fifty-six grants, totaling \$4,127,500, by 1989.

Once the first president of the William and Flora Hewlett Foundation had articulated a sturdy set of values and an operating vision, the next step was to implement those values and that vision responsibly, while retaining enough flexibility to be responsive to the changing external environment. This was a tall order.

Fortunately, the foundation had an advantage—the partnership and emerging friendship of Hewlett and Heyns. They shared a rare meeting of minds and hearts. Both were modest, down-to-earth men of considerable intellectual capacity, and both had a preference for not making a fuss. The internal culture that developed under their leadership was unique, characterized by practicality, flexibility, and intellectual rigor, all with a low-key approach.



Musicians from San Francisco Conservatory of Music play for people waiting in line for fuel during the gas crisis of the 1970s (Fred Upton/San Francisco Conservatory of Music)

Bill Hewlett's contribution to the foundation's way of conducting business derived directly from the internal culture he created with David Packard at the Hewlett-Packard Company during its halcyon days. The "HP Way," as company documents described it, emphasized high quality, innovative products, "management by wandering around and an open door policy," and "honesty and integrity in all matters." The "hire good people and trust them" ethos of the HP Way was successfully transplanted in the Hewlett Foundation's culture and structure.

The Hewlett Foundation's reputation for intellectual rigor can be traced to its first president. Heyns' background in academia brought to the weekly program staff meetings an emphasis on informed and respectful debate and defense of theses, which former program directors and officers remember with fondness to this day. (This aspect of the foundation's internal culture surely endures because each of the four presidents of the foundation has come from an academic administration background, either from the University of California, Berkeley, or Stanford University.)

On a personal level, Heyns' style was warm and accessible. According to Hewlett folklore, he often brought his lunch in a brown paper bag so he could sit and talk informally in the lunchroom with the (then quite small) program staff. And he always insisted on taking his turn doing kitchen duty.

Together Hewlett and Heyns—equipped with a defined set of values and operating directions and an emerging internal culture to back them—set about the hard work of implementation. This was going to be done the scientific way: innovation through trial and error, evaluation, and re-tooling.

Heyns began by recruiting the first professional arts-specific help to bring order to the Arts and Humanities Program. Virginia Hubbell was brought in as a consultant, fresh from playing a similar role as the first administrator of the Grants for the Arts/San Francisco Hotel Tax Fund.<sup>12</sup>

With the allocation to arts and humanities stabilized, as a matter of policy, at an average of 10 percent of funds disbursed annually, and the importance of arts and humanities acknowledged by Heyns in the Memorandum, Hubbell set to work designing a program that would most effectively serve the founders' interests, specifically classical music and training, primarily of gifted young performers. As one of his first "networking" projects, listed as a tool in the Memorandum, Heyns sent her on a listening tour to interview major institutions in New York City and Washington, D.C., relevant to these areas.

<sup>12</sup> Thus, Hubbell was the first administrator to shape policies and practices at the two major institutions in the Bay Area that made renewable general operating grants to cultural organizations.



A production at El Centro Campesino Cultural in the late 1970s (Hewlett Foundation archive)

Arts and humanities funding by the foundation had always been somewhat idiosyncratic, sometimes encompassing museums and libraries, sometimes not, sometimes stressing semi-professional artists, sometimes not. The only consistency was the bedrock of Western classical music, specifically the San Francisco Symphony, and education of young musicians.<sup>13</sup> An important task (and one that has continued in various forms to the present) was to define what, exactly, was encompassed by the term “arts and humanities,” and, within a few years, “performing arts.” Instructive examples are the unfolding, and very different, fates of museums and opera as part of the portfolio.

<sup>13</sup> Arts education, and specifically the training of young musicians within the Western classical tradition, was an unshakeable foundation of the Hewletts’ funding interests. The Community School of Music was added to the roster in 1975, and the Conservatory of Music in 1976, both prior to Heyns’ arrival.

The 1978 *Annual Report* offers this Program description:

The program's main focus is on the performing arts—music, dance, theater. The foundation also has an interest in museums, libraries, and special collections of unusual value in the arts and humanities.

The 1979 *Annual Report* reaffirmed that the main focus would be the performing arts, but that the foundation “has a secondary interest in museum management and in special collections of unusual value to the arts.” Museums were demoted to secondary status, and libraries were gone.

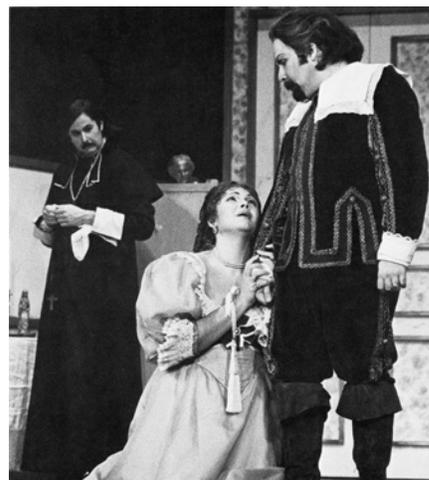
By 1980, the Board discussed changing the name of the program to “Performing Arts and Museums” to describe the Program more accurately, but by the end of the year the decision was made to drop museums entirely, and the name was changed officially to the Performing Arts Program. The 1980 *Annual Report*'s Program description explicitly states, “In 1981 the foundation will not make grants to art museums, museum associations, or to the humanities.”

While opera was not named as one of the performing arts of particular interest to the foundation, by 1979 several opera organizations had received funding, and in the 1980 *Annual Report*, opera joined classical music, dance, and theater as the focus of the Performing Arts Program. The definition of what constituted “performing arts” was taking shape.

With clear and explicit published guidelines, the foundation was “on the map,” and grant requests exploded. Hubbell's report to the Trustees, entitled “Funding in the Performing Arts Field,” illustrates the external pressures:

The number of arts and humanities requests for funding has increased across the country. At the Hewlett Foundation, the number of requests received this year is an increase of 500 percent over last year. The primary reason for the large number of proposals is that nationally, the cultural field is in a period of growth... Another reason is the passage of Proposition 13<sup>14</sup>. The most important reason is that, in relation to the needs, there are few national or local foundations funding the arts that are offering substantive support...of those that do, many will not fund general operating, and the majority of foundations will fund only in their own communities.<sup>15</sup>

Based on her networking tour of East Coast establishments, coupled with her appreciation of the importance of general operating support in the arts, Hubbell was in a unique position to shepherd the Board through these attempts to define the nascent Program. Her other lasting contribution to the unfolding discussion about direction was to add “umbrella,” or service organizations, to the mix as possible grantees. This emphasis on supporting the infrastructure that supports arts and arts funding would emerge as a central strategy of the Program over the years to come.



A San Francisco Opera production of *Tartuffe* (Hewlett Foundation archive)

<sup>14</sup> This proposition significantly reduced funding for arts education programs in California's public schools.

<sup>15</sup> “Board of Trustees Docket” (November 29, 1978).

In 1980, the first staff devoted entirely to the new Performing Arts Program was hired to replace consultant Virginia Hubbell. Gail Stockholm assumed the newly created position of program officer. She was replaced within eighteen months by Eric Peterson, who occupied the post for six years.

Shortly after his arrival, Heyns instituted six-year term limits for key staff who made decisions about the distribution of grant monies. It was a practice rather than a policy, and was already in place when Hubbell was hired, although, as a consultant, it didn't apply to her. The concept of defined staff tenures was not mentioned in the "Memorandum" of 1977, and the written record does not indicate its origins as a policy until 2005, when President Paul Brest introduced a term-limit policy, extended to eight years, for ratification by the Board of Trustees. By all reports, Heyns had several purposes in mind: to assure fresh thinking in each of the programs, to mitigate against the potential loss of objectivity, and to prevent the mischief of favoritism.

During Eric Peterson's tenure, a support person was hired to help with the increasing workload. This assistant was shared with another program. Also, for the benefit of the Board, Peterson instituted a new practice of grouping proposals for Board consideration by performing arts discipline to identify common issues within each discipline, and highlight the differences among them.

Peterson was also responsible for instituting a matching requirement for all grants. In most cases the match was required to be either designated for endowment or a cash reserve. This policy would continue through Peterson's tenure as program officer. (When Barbara Barclay replaced Peterson as program officer, she almost immediately reversed the policy requiring a match for Performing Arts grants. Few organizations had succeeded in making the required match, and most had found the policy onerous rather than helpful.)<sup>16</sup>



A piano lesson at Community Music Center in the 1980s (Hewlett Foundation archive)

<sup>16</sup> However, the option of structuring grants as matching for establishing endowments and cash reserves would continue to be used selectively with grantees for whom this was a practical strategy given their circumstances.

A precursor of things to come appeared in the 1980 guidelines, with the first public mention of general operating support. While it was not a new idea in philanthropy, it was not widespread and remained controversial, primarily because it meant the funder relinquished control over the use of funds. Here was another manifestation of the “hire good people and trust them” ethos the foundation inherited from the HP Way.

While “a preference” for general operating support was first broached in Heyns’ Memorandum to the Board in 1977, it hadn’t yet been mentioned in the published guidelines, which now stated: “We will consider requests for general operating funds, but prefer requests that identify a specific administrative or artistic outcome and target the funds carefully toward a definable result.”

The understanding of how general support would be applied was evolving, and, by 1984, Heyns felt it was important to articulate the Hewlett Foundation’s philosophy about evaluation of grantees in the context of multi-year grants:

A number of the Hewlett Foundation’s grants are for general support of an organization...Our evaluation of these grants is based on the criteria used in the grantmaking process itself; the fit between the activities of the organization and the foundation’s interests; the strength of the organization, and its capacity to carry on important activities of high quality...

Sometimes precise evaluation is premature; what is needed at the moment is support for the intelligent effort of thoughtful people on a difficult and important problem. There will be time later for a special effort at evaluation.

On the one hand, foundations are obliged to be accountable for the procedures and their decisions; on the other hand, they must be active in areas where problems are complex, progress is slow, and precise measurement is not always timely or possible.<sup>17</sup>

While it was the theory of the foundation to provide general operating support, in practice early annual reports listed primarily project-related grants. By 1986, however, the shift to making primarily general operating grants was nearly complete, with twenty-seven of thirty-four Performing Arts Program grants awarded for general operating, and seven listed as “other.”

Guidelines continued to shift emphasis, adding some areas of interest and dropping others. In 1980, Performing Arts guidelines explicitly excluded “ethnic arts (including crafts, folk and popular music, jazz, and ethnic dance)...independent radio, television, and film projects.” Within three years the foundation’s exclusion of media would be reversed. Addressing ethnic arts would take somewhat longer.

<sup>17</sup> Roger Heyns, “President’s Statement” (1984).

In 1988, Peterson recommended expanding funding policies to include “ethnic arts,” using the foundation’s interest in classical traditions as rationale:

There are many opportunities, among the performing arts activities now ineligible for foundation support, for effective grantmaking. One is increasing the support for presentations of the classical art forms from other cultures. The ethnic composition of the region, as well as future demographic projections, suggests that the arts program’s current orientation will not encompass the cultural interests of an increasingly large segment of the population. I would urge that the Board encourage the development of a program to identify and support the ethnic classical arts groups and assist their traditional orchestras, theaters, and dance companies to reach growing ethnic audiences.<sup>18</sup>

In response, the minutes record, “The Board stated that it was in favor of exploring grants for choral groups, but was inclined not to pursue the inclusion of ethnic arts.”

The subject was not closed, however. Barbara Barclay assumed the position of program officer, vacated by Peterson, in 1987. Within eighteen months of her arrival, she approached the subject of “ethnic arts” from a different direction. She used demographic and leadership rationales for expanding the funding guidelines to include what she called “multicultural organizations,” consistent with the language being used in the field at large at the time:

Because the funding community is sensitive to the demographics of the San Francisco Bay Area, it is expected that support for multicultural organizations will increase in the next few years...Staff believes that Hewlett’s leadership role as the major provider of operating support for a very broad base of performing arts organizations (including multicultural organizations) is critical to the health of the arts community and should be maintained.<sup>19</sup>

In the minutes of the meeting, the Board approved all recommendations in the “Budget Memorandum,” including this one. Nonetheless, in practice the Program’s portfolio continued to remain firmly rooted in, and dominated by, the Western European classical tradition.

Late in 1989, a constellation of events brought this period of trial and error and expansion of assets to an abrupt close. On Friday, October 13, the stock market crashed, initiating a national recession that was felt particularly in the Bay Area, as four days later, on October 17, the Loma Prieta earthquake struck.

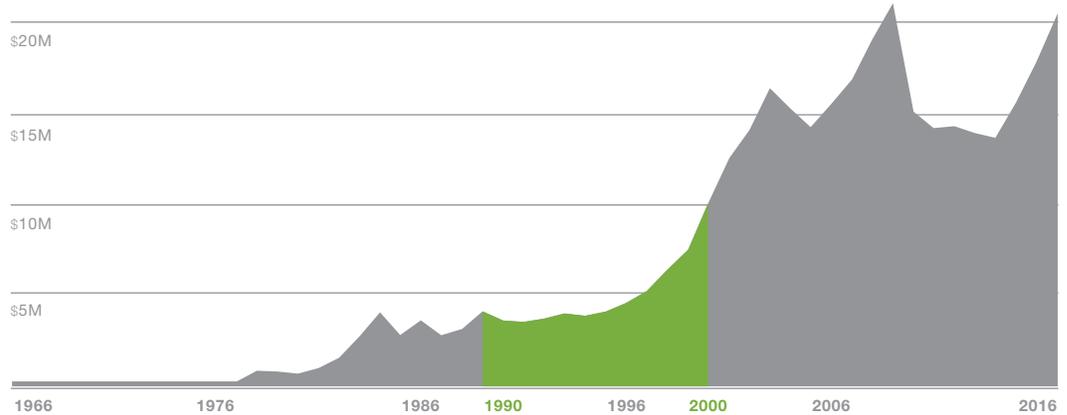
<sup>18</sup> Eric Peterson, “Budget Memorandum” (1988). Peterson’s departing memo to the Board.

<sup>19</sup> Barbara Barclay, “Budget Memorandum” (1989).

## v. CONSOLIDATION

1990 to 2000

TOTAL ARTS GRANTS	
1990	\$3,600,000
1991	\$3,600,000
1992	\$3,850,000
1993	\$4,015,000
1994	\$3,925,000
1995	\$4,250,000
1996	\$4,750,000
1997	\$5,475,000
1998	\$6,850,000
1999	\$7,881,100
2000	\$10,126,000



After an intense period of experimentation had given shape to the Performing Arts Program, the recession and the aftermath of the earthquake ushered in a new era that challenged many assumptions and practices.

Funds for distribution initially declined, then flattened out for several years, calling for careful management until the regional economy recovered and the available funds started to climb again in the mid-'90s, reaching new heights by the end of the millennium. The period saw an unusual number of crucial leadership changes on every level. All these factors combined to create new opportunities for fresh thinking about the Performing Arts Program's mission and its evolution of priorities, out of which it emerged considerably stronger and more sure-footed.



A production of Lemony Snicket's *The Composer is Dead* at Berkeley Repertory Theatre (Kevin Berne)

The year 1990 began a difficult time for the Performing Arts Program and for grantees. Barclay depicted the effects of the Loma Prieta earthquake on grantees:

The October 17 earthquake's economic impact has already been felt by many arts organizations through damages to facilities, loss of ticket revenue, and a decline in contributed income. Throughout the next year, the Hewlett Foundation, as the major funder of performing arts organizations in the Bay Area and Santa Cruz County, will be asked to respond to increasing requests for assistance.<sup>20</sup>

The limited funds available to deal with the urgent problems being faced by grantees put pressure on the foundation-wide practice of multi-year grant renewals, a practice not foreseen by Heyns in his 1977 "Memorandum," when he had stated:

I think we again should have a tilt toward the longer support period: three to five years.

Renewals were not mentioned as part of Heyns' operating vision. But, in reality, all programs had, to some degree, adopted the practice of making many—in the case of the Performing Arts Program, most—operating grants for two- to three-year periods, with likelihood of renewal. In 1990, Barclay spotlighted the phenomenon for the Board as a foundation-wide issue:

During the period 1984–1991, 65 percent of the foundation's grants went to prior grantees, with considerable variation within programs, and for the foundation as a whole.<sup>21</sup>

This subject had particular relevance for the Performing Arts Program because of its high incidence of renewals, which she made clear the following year:

While prior funding is not an assurance of continued funding, staff anticipates maintaining the 80 to 85 percent renewal average.<sup>22</sup>

All of this went unremarked upon during the period of swift asset growth, but now, in the face of contracting resources, the issue embedded in the founding principle of assuring general operating support over multiple years was up for discussion: what, exactly, was the meaning of "multi-year funding"?

<sup>20</sup> Barbara Barclay, "Budget Memorandum" (1990).

<sup>21</sup> Ibid.

<sup>22</sup> Barbara Barclay, "Budget Memorandum" (1991).

The renewal practice had become one of the defining features of the foundation's grantmaking, inseparable from its commitment to general operating support. Big questions were being asked, and a lot was at stake. Barclay parsed for the Board how deeply renewals were embedded in the Performing Arts Program, and the impact the continuation of the practice would have on the grants allocation for the next year:

These [recommended] allocations are based on the number of renewal grants expected in each category. Of the fifty grants which will expire in 1990, at least forty-five are expected to request renewal funding. Renewed funding for forty groups at levels similar to previous grants would amount to 92 percent of the performing arts budget, leaving \$280,000 to respond to new requests, to increase the renewal amounts, or to meet special earthquake-related needs of grantees. A primary concern will be deciding which prior grantees to decline or defer to keep some funds available for new ideas of organizations.<sup>23</sup>

The minutes of the January 26, 1990, Board meeting record the Board's response:

The consensus was that the foundation's Performing Arts Program should remain at approximately 10 percent of the grants budget and that ***the problem of repeated grants to the same organizations should be addressed.***<sup>24</sup>

Although time passed and many things competed for the Board's attention, the subject was not forgotten, and two years later, the minutes of the April 11, 1992, Board meeting report a lively discussion about renewal grants:

Renewal rates tend to be highest in the population, performing arts, and regional grants programs. However, for the foundation as a whole, there is a slight trend upward in renewal rates in the last four years. This is due to several factors, among them the foundation's interest in institution-building and in providing multi-year support. The policy of designating a limited number of grantees that fit a particular program interest is also a factor leading to renewals. Mr.<sup>25</sup> Heyns indicated his intention to continue study of the renewal phenomenon. While a high rate of renewal is understandable given foundation policies and programs, it is important that the foundation not lose its flexibility to respond to new grantees.

The Program adjusted to this challenge:

With a constant overall grants budget over the past several years, the foundation has responded to this increased pressure in the following ways: eliminating grants at the margin of program interest; eliminating elements in programs; reducing the size and duration of grants; and raising the criteria a grant must meet. Each of these responses provides flexibility for the foundation to respond to new urgent needs.<sup>26</sup>

<sup>23</sup> Barbara Barclay, "Budget Memorandum" (1990).

<sup>24</sup> Emphasis added.

<sup>25</sup> Heyns is variously referred to in foundation documents as Dr. or Mr.

<sup>26</sup> Barbara Barclay, "Budget Memorandum" (1993).

Through Barclay's consolidation efforts, the Program managed to both meet its renewal commitments and retain the flexibility to bring new grantees into the portfolio. Within a few years, the economy recovered and renewals, even at the high rate employed by the Performing Arts Program, had become embedded in the practices of the foundation. Like term limits for staff leadership, while not explicitly initiated as a policy, it was a concept that came to be accepted as central to the way the foundation did business.

The subject also became moot because, notwithstanding his intention of looking further into "the renewal phenomenon," in 1992 Heyns resigned as president of the foundation. In 1993, the Board selected Dr. David Pierpont Gardner, former president of the University of California, Berkeley, for the position. Other key leadership positions changed hands in swift succession. In 1994, Walter Hewlett replaced his father as chairman of the Board. And in 1996, Barbara Barclay, having served two years beyond the six-year term limit then in effect for program officers, was replaced in the position by M. Melanie Beene.<sup>27</sup>

Roger Heyns was so influential in the history of the foundation, and so personally beloved, it would have been close to impossible for anyone to assume the president's chair after his departure. Adding to the difficulty, Gardner's conception of his role departed from that of his predecessor—he saw himself more as caretaker than active shaper of the foundation. Consequently, he had little influence on the history of the Performing Arts Program, except to the extent that his hands-off approach encouraged the two program officers that served during his tenure, Barclay and Beene, to take leadership of the Program, and both met the challenge with skill, energy, and imagination.

Early in her tenure, Beene prepared a position paper for the Board reaffirming the foundation's long-standing principle of building institutions:

The goals and recommendations that follow concentrate on preserving and fine-tuning the foundation's historic approach to arts grantmaking, with the focus squarely on long-term institutional health.<sup>28</sup>

<sup>27</sup> Barclay posits that her term was extended to assure the Program's stability during this period's other leadership changes and budget challenges.

<sup>28</sup> M. Melanie Beene, "Performing Arts Program, 1997 Goals and Recommendations" (1997).



A production of *Blues for an Alabama Sky* at Lorraine Hansberry Theatre (Steven Anthony Jones)

She outlined an ambitious vision for expanding the program in ways that were precipitated by recommendations by Peterson and Barclay, but not actively taken up by the Board in years past. These ideas fell under Beene's rubric of "different voices, different ears":

Where resources allow, staff will seek out opportunities to expand our current portfolio to include more organizations of quality that exist in the margins of what is typically thought of as "the performing arts," ideally ones that are reaching broader or different audiences than those served by our current grantees... This may entail a wider geographic reach and research outside the Western European classical tradition in which the core of our grantees work... In general staff would recommend keeping the same geographic focus, treating the Bay Area as the center of its target (all nine counties) but then seeking, first in the Western region and later elsewhere, opportunities to fund organizations of quality that are reaching broader or different audiences than those served by our grantees, e.g., living and continuous American Indian traditions, the multi-varied pioneer settlement experiences; and Pacific Rim and Latin American immigrations, both historical and contemporary.

The immediate results of these recommendations were eliminating the word “classical” in the printed program guidelines—which had been used since the earliest days of the foundation to focus the music discipline—and dropping the explicit prohibition against funding “folk arts,” called “ethnic arts” in the ’80s.

Beene also recommended some refinements to the internal workings of the program, establishing for the first time a mission and written criteria for decision making to make the foundation’s internal process more transparent.

The mission of the performing arts program of the Hewlett Foundation is to support artistic expression and its enjoyment through grantmaking aimed at the sustainability of organizations of quality that are valued by their communities.<sup>29</sup>

The new review criteria would be: artistic merit, community participation, ability to plan, governance and managerial capacity, and fiscal health.

By the late 1990s, the amount of funds being disbursed, and the sheer size of the docket, prompted some other internal changes. Peterson and Barclay had managed the Program each with a part time assistant shared with another program. By 1998 Beene had hired the first two full-time Performing Arts Program-specific associates to help manage the volume of work. The expansion also prompted Board discussions about how to deal with the longer agendas, which could only increase in length as assets grew. The 1998 Board docket segregated grant approvals into manageable categories, including a consent agenda for routine renewals, a section for non-routine renewals, and one for new grants. The use of a consent agenda proved a valuable time-saver, but the minutes of Board meetings reflect the loss of the rich philosophical Board debate of previous years.

The reality of the growing assets was having its impact on all the programs, including Performing Arts, as Barclay’s old problem—how to do more with less—gave way to a new problem: how to responsibly do more with more.

The first strategy was to limit funds granted to a maximum of 10 percent of an organization’s annual operating budget.<sup>30</sup> While the lean years of the early ’90s limited funding options, the new growth in available funds required new thinking about what increased funding levels were appropriate for the typical scale of operations of cultural organizations: too heavy a dependence on Hewlett Foundation funding might be destabilizing and inadvertently subvert the Program’s objective of strengthening internal capacity.

Beene was also the first to view the arts in the Bay Area as an “ecosystem,” a novel concept at the time. Again, it was a concept, not a policy, but it would have considerable staying power, justifying the importance of supporting not just organizations, but the extensive infrastructure that had grown to support the arts:

To extend a metaphor from the Environment Program, the nature of the arts field is broad and expansive with a few tall redwoods (the major, large-budgeted symphonies, operas, and ballets), some mid-sized shrubs, and a vast array of grasses and wildflowers of every color and description that are continually taking root and dying, making the artistic landscape as interesting and varied as a walk through a Northern California meadow. The impact of this particular ecology distinguishes the Performing Arts Program from others at the foundation.<sup>31</sup>

<sup>29</sup> Ibid.

<sup>30</sup> M. Melanie Beene, “Budget Memorandum” (1997).

<sup>31</sup> Ibid.

In other words, the nature of the performing arts field, as distinct from the fields represented by the other programs in the foundation's portfolio, served a population with special needs, which she goes on to articulate, describing why the Performing Arts Program must operate somewhat differently from the other programs:

The Performing Arts Program aims at sustaining the quality of the naturally occurring abundance of artistic expression in the Bay Area. Although our budget dollars are among the smallest, the number of grants awarded is by far the largest, more than double the volume of some of the other programs. Performing Arts grantees tend to call for higher maintenance interactions as well, because they are smaller and less sophisticated, and are located in our backyard.

In a traditional, non-philanthropic business analysis, the unit-cost of Performing Arts grant processing is quite high, perhaps the least cost-effective of any program, but this is the appropriate and necessary course that flows from our goals and objectives. As the foundation grows, the groups that will tend to be added, if we continue the current program, will likely be predominantly smaller organizations reflecting the nature of the field.

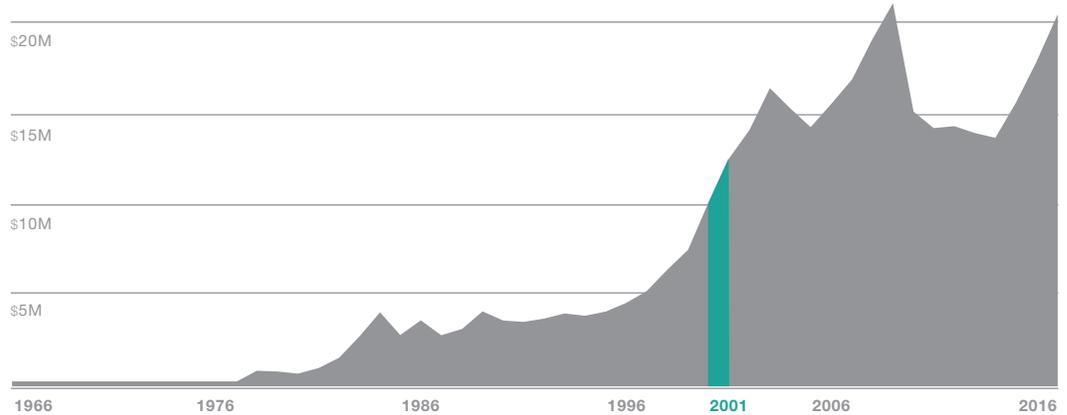
In 1999, an energetic and dynamic new leader took the helm. Formerly the dean of the School of Law at Stanford University, Paul Brest assumed the presidency of the foundation at an unprecedentedly complex time. Among the challenges he would face: building a model facility to house the foundation; dealing with the fallout of economic turmoil; and managing a fluctuating endowment that was expected to grow rapidly.

Specifically, the Board and Brest were painfully aware that, with the passing of founder William Hewlett, the execution of his will would increase the assets of the foundation 400 percent. While everyone hoped this eventuality would be delayed for as long as possible, prudence dictated that plans be made to absorb the funds. Brest asked each program officer to ponder how their program could use significantly increased grant monies. This began an intense period of strategic planning on a program-by-program basis over the next several years.

## vi. A DIFFICULT YEAR

2001

TOTAL ARTS GRANTS  
2001 \$12,844,000



Two thousand and one was a hard year: for the world, for philanthropy, for the field of the arts, and specifically for the Hewlett Foundation.

The planes struck, the world changed.

Founder William Hewlett died.

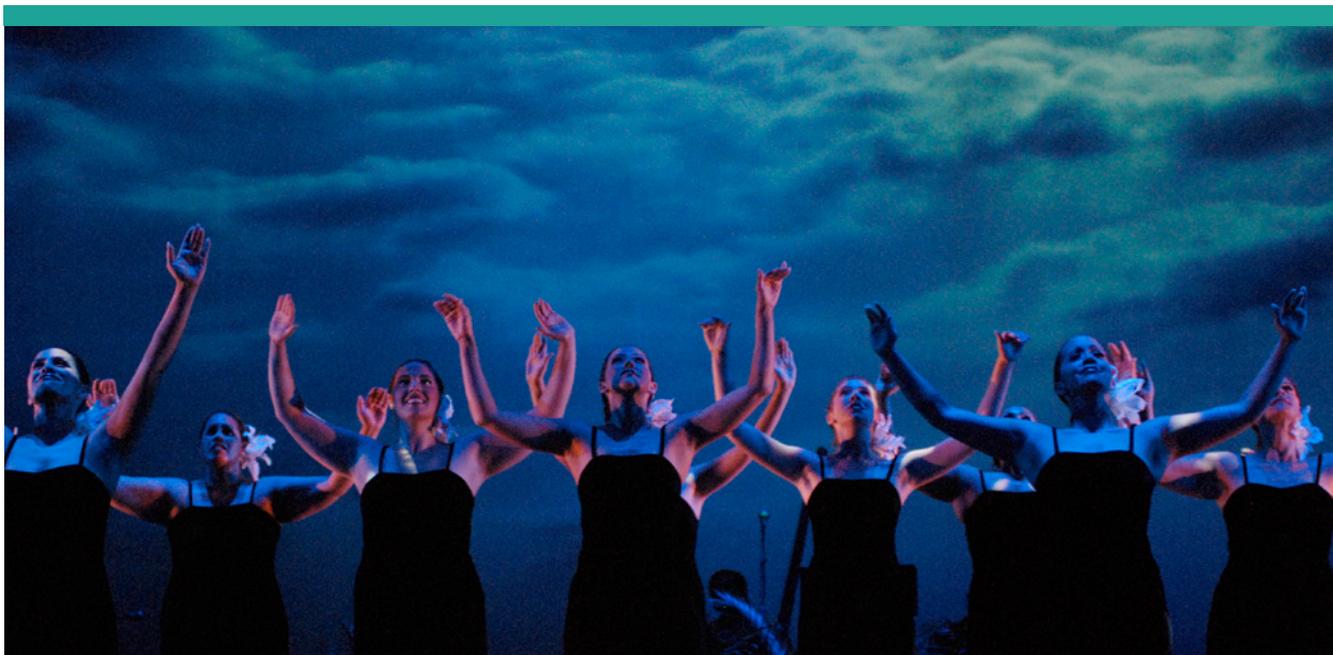
What was known as the dot-com boom turned bust, initiating another national recession.

And, through unique circumstances, the title of program officer of the Performing Arts Program was held by four individuals in eight months.

In 2000, Beene had commissioned an evaluation of the Performing Arts Program to inform thinking about the future of the performing arts. In addition, she convened several focus groups of regional and national leaders in the field to explore possibilities for the foundation. This effort yielded a memo, “Future Directions for the Performing Arts Program,” dated February 3, 2001.



William R. (Bill) Hewlett



Nā Lei Hulu I Ka Wēkiu performing “The First Time Ever I Saw Your Face” (Patrick Makuakane)

The Board considered her recommendations and responded:

Melanie stated the intention to retain the core of the existing program and to seek Board guidance on the following five new initiatives: strengthening underfunded arts organizations through grants for building or improving facilities and purchasing equipment; funding programs that target children in low-income communities; broadening cultural participation; encouraging individual creativity and accomplishment by supporting individual artists; and stimulating innovation by funding extraordinary ideas that do not fit existing guidelines. The geographic focus of the program would continue to be the Bay Area, but would also consider funding requests from other California, West Coast, national and international areas that have a relationship with the arts in the Bay Area.

Performing Arts is the one program that doesn't deal with major social or environmental problems, but rather supports essential cultural institutions. The Board discussion suggested that the foundation plays an important role in supporting performing arts in the Bay Area, that it is well focused on this objective and serves it well. While there was strong support for addressing the arts space crisis, the sense of the Board was that there was no need for an expansion of the program at this time.<sup>32</sup>

In short, the Board decided not to expand the program by discipline or geography, but it did allocate additional resources to address the facilities crisis. Among Beene's suggestions, one—to broaden cultural participation—had been recommended to the Board by her two predecessors, Peterson and Barclay as well, although under different names (“ethnic arts” and “multicultural arts”). However, the time was still not right for action on this issue.

<sup>32</sup> “Board Meeting Minutes”  
(February 11–12, 2001).

Beene resigned her position in May 2001. Her staff consisted of two program associates, Susan Duncan and Andrea Faiss, who were appointed co-interim program officers. Almost immediately, Faiss went on maternity leave, leaving Duncan to hold things together for the eight months it took to conduct a national search for Beene's successor.

Moy Eng officially arrived in December 2001, and was handed a very precise mandate:

In February 2001, the Board reaffirmed the foundation's commitment to the existing direction of the Performing Arts Program and authorized a response, via supplemental allocations, to the facilities crisis many of our San Francisco grantees were facing.

Thus, the Program's direction in 2002, under new Program Officer Moy Eng, will be a continuation of the work to date, namely, providing support through budgeted allocations to professional dance, music, opera, musical theater, and theater companies, as well as organizations that present the performing arts. In addition, the foundation supports arts councils that serve San Francisco Bay Area communities and service organizations that assist performing arts organizations in all disciplines. It also makes grants to support Bay Area nonprofit film and video service organizations. The program's geographic focus is the San Francisco Bay Area. (The Bay Area includes the nine counties that border San Francisco Bay, with more restricted funding in Santa Cruz and Monterey counties.)

The focus of foundation support is on long-term artistic development and managerial stability achieved primarily through a strategy of multi-year general operating support to organizations of programmatic merit that operate without incurring annual deficits. Where appropriate, the foundation will recommend a matching requirement, and, additionally, that a portion of the matching funds be applied to endowments or cash reserves to help ensure the long-term financial stability of its grantees.

The foundation gives preference to independent nonprofit Bay Area organizations with an established record of artistic achievement, administrative capacity, audience support, and realistic planning for artistic and organizational development. Artistic training programs, particularly those focused on young people, continue to be of interest to the foundation.<sup>33</sup>

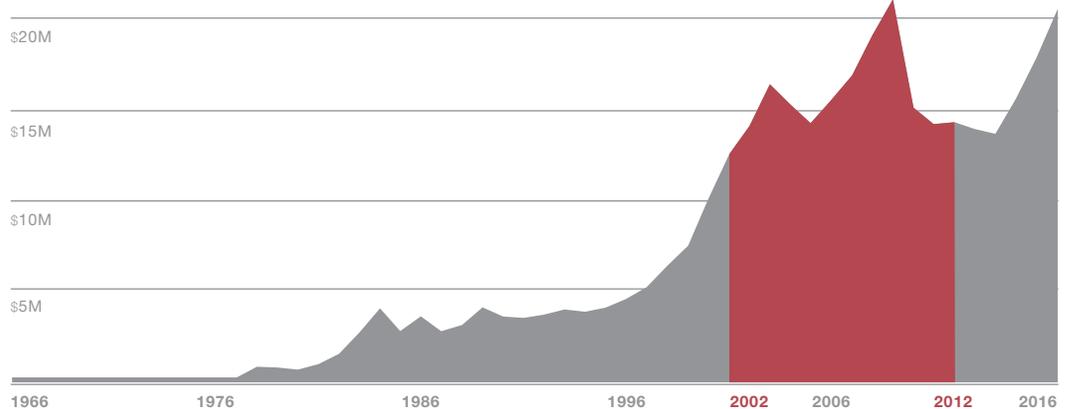
For a thorough and accurate snapshot of the Program at the time, this description cannot be beat. It perfectly synthesizes the outcome of three decades of change, and includes two crucial threads with long history in the foundation, which, during Eng's tenure, would be woven into large, sustained efforts: strengthening organizations by building their balance sheets through capitalization (specifically capital grants for facilities, endowments, and cash reserves) and arts education for young people.

<sup>33</sup> "Budget Memorandum" (2001)

## VII. OUTCOME-FOCUSED GRANTMAKING

2002 to 2012

TOTAL ARTS GRANTS	
2002	\$14,461,000
2003	\$16,228,400
2004	\$18,216,500
2005	\$14,985,500
2006	\$16,151,250
2007	\$18,216,500
2008	\$20,938,355
2009	\$15,214,020
2010	\$14,100,149
2011	\$14,173,145
2012	\$13,942,075

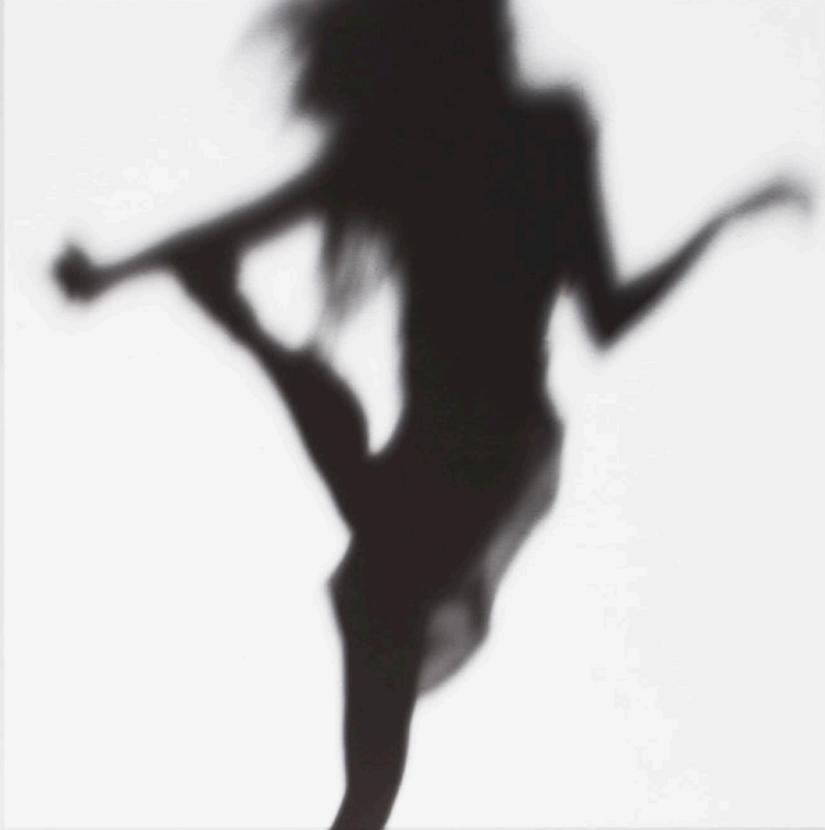


Through most of the next decade, the partnership of Brest and Eng steered the Performing Arts Program through significant changes, both within the Hewlett Foundation and in the fields of the arts and philanthropy.

Internally, the period was characterized by two major developments. First, the volatility of the stock market played havoc with the amount of available grant monies. The rollercoaster ride began early in the decade, as funding contracted with the aftermath of 2001, it swiftly increased to a high water mark in 2008, then suffered an even more precipitous decline during the recession following the housing crisis.<sup>34</sup>

The other noteworthy internal factor was the foundation-wide effort to develop what became known as Outcome-Focused Grantmaking (OFG). OFG was the Hewlett Foundation's fine-tuning and re-tooling of the Theory of Change, a respected conceptual framework for planning and evaluation, developed by community activists as a way to resolve complex issues. OFG would have profound impact on the Performing Arts Program.

<sup>34</sup> Total grants from Performing Arts rose from \$14 million in 2004 to \$21 million in 2008, declining to \$13 million in 2009. These figures do not include a 2006 one-time bump of \$25 million in capital endowment gifts from the Extraordinary Reserve to celebrate the foundation's fortieth anniversary. Endowment grants were awarded to the San Francisco Opera (\$10M), San Francisco Symphony (\$5M), San Francisco Ballet (\$5M), and American Conservatory Theater (\$5M) in recognition of the foundation's commitment to the performing arts for four decades.



A dancer with ODC (RJ Muna/ODC)

Externally, big changes were afoot in the arts. By 2003, Eng noticed that the entire field appeared to be contracting in two particularly worrisome ways. First, audiences for live performances were changing. Factors included, first, demographic shifts—aging out of traditional audiences, coupled with increased immigration patterns, and the profound impact of media alternatives on attendance at live performances; second, the decline in national funding for nonprofit live performing arts, as a result of the economic recession. Eng quantified the relevance of this to the Bay Area:

To date, net loss is more than 25 percent in one year from reductions in CAC [California Arts Council] and Packard [Foundation] funding alone and, unfortunately, more reductions are to come.<sup>35</sup>

Nevertheless, Eng continued to implement the charge, outlined for her by the Board, to maintain the core strategy of long-term investment in high-quality performing arts organizations with multi-year general operating support. In addition, she moved forward two projects initiated by her predecessor that would evolve into significant initiatives. One was the ongoing effort to ameliorate the impact on the arts of the real estate crisis resulting from the dot-com bubble. The other was a seemingly modest joint effort with the Education Program, a collaborative grant to help “lead implementation of Silicon Valley’s 20/21 Regional Cultural Plan,” which identified its goal as upgrading creative education in local schools.

First, she brought to fruition the ongoing efforts to fund arts facility capital projects, begun at the height of the dot-com boom. Although the real estate market had fallen precipitously, Eng foresaw this was the perfect time to make a difference by capitalizing on below-market opportunities to secure space needed by arts organizations. The outcome in 2003 was a \$3 million Nonprofit Space Capital Fund for the development of critically needed arts and cultural facility space in the Bay Area.<sup>36</sup>

Second, building on the modest joint grant with the Education Program, she recommended increased funding and collaborative grantmaking with Education and Special Projects for arts education, “to allocate funding for new ideas and opportunities that test new ways of creating, presenting, and disseminating the arts.” By the following year, this would take form as a joint effort between the Performing Arts Program and the Education Program to each commit \$1.5 million of their 2005 budgets to arts education, with considerably larger ambitions than just having an impact on local schools.

<sup>35</sup> Moy Eng, “Budget Memorandum” (2003).

<sup>36</sup> This was consistent with the foundation’s long-term interest in strengthening institutions through capitalization strategies (facilities, endowments, and cash reserves), an interest that was further expressed around this time by a \$2.2 million grant to Opera America for endowment grants to seven national music services organizations, and, in 2006, on the foundation’s fortieth anniversary, \$25 million in endowment grants were made from the Extraordinary Reserve to four long-term grantees.

The expansion of these two projects into initiatives was in place by 2005, when the Board docket categorized all Performing Arts Program activities as falling into three components:

- Core Commitments (meaning multi-year general operating grants)
- Space
- Arts Education <sup>37</sup>

The latter two endeavors had something in common—both represented problems to be solved, and in this sense, joined the dominant paradigm of foundation grantmaking. Elsewhere Brest acknowledged the dominance of problem solving as the orientation of the foundation:

With the exception of Performing Arts and grants that are designed to sustain important educational and cultural institutions, most of the foundation's grantmaking is concerned with solving social and environmental problems.<sup>38</sup>

Indeed, two of what were now named as the three primary areas of concern for the Performing Arts Program had become about solving definable problems. However, the third area—what was being called the “core commitment” of the Program—providing multi-year general operating grants to quality Bay Area performing arts organizations, was not a definable problem. It was something else, something more difficult to categorize.

Early in the foundation's evolution, Heyns made clear he perceived the arts as being different from other foundation endeavors:

In support for activities in the arts and humanities, the foundation states its belief that a vigorous artistic intellectual life is essential to the full development of human potential.<sup>39</sup>

The Performing Arts Program, with this deep commitment to the full development of human potential at its core, had become a hybrid, encompassing two major efforts aimed at solving definable problems (categorized as Arts Education and Space), and a third with a transcendent, profoundly humanistic vision that defied easy articulation.

This dual nature, unique to the Performing Arts Program, was about to be tested.

<sup>37</sup> It is worth noting that this represented the first time arts education was featured prominently in the Program's strategic plan, rather than being categorized as a strategy in logic models over the years for meeting other identified outcomes. This can be seen as a return to the very earliest interests of William and Flora Hewlett, as education and training of youth in the arts were a focus of their philanthropy from the beginning.

<sup>38</sup> Paul Brest, “President's Memo, Appendix I” (2007).

<sup>39</sup> Roger Heyns, “Policy and Procedures Memorandum to the Trustees” (1977).

Given a long history of providing multi-year general operating funds, Brest cast his analytical eye on the question of what, exactly, would success mean? Leaving aside the expectation of growth, were the individual organizations and institutions in the portfolio, and was the foundation itself, clear on what success would look like? Brest considered this a crucial question.

In 2004, a new emphasis on planning and, particularly, on evaluation, was introduced into Hewlett Foundation operations. It was a theoretical system of thought that has variously been called “outcome-focused” or “strategic” philanthropy, and it had profound and lasting effects. Brest introduced the new concept, and a new planning and evaluation tool, which he intended to apply to all foundation activities—the logic (or causal) model:

Although most nonprofit organizations have a mission statement and some have a general description of their strategy, relatively few have a written plan implementing the organization’s mission and strategy...What is usually missing is a causal model: a clear causal model—sometimes called a “logic model”—specifies the organization’s desired outcomes, describes each step of the process necessary to achieve them, and identifies milestones on the way to success. In its simplest form, a causal model takes this form:

INPUTS ▶ ACTIVITIES + OUTPUTS ▶ OUTCOMES

Inputs consist of the organization’s human and financial resources; activities and outputs are what the organization actually does and delivers; and outcomes are the ultimate results it plans to achieve.<sup>40</sup>

Logic models came out of a larger theoretical framework called the Theory of Change, a system that emerged in the mid-’90s as a response to the challenge of evaluating complex community initiatives at the Aspen Institute Roundtable on Community Change. It evolved over time as a model for planning and evaluation to achieve specified goals, or outcomes, and is used by a long and impressive list of nonprofits, foundations, and NGOs, including the United Nations.

The Theory of Change, as expressed in a specific logic model, involved reasoning backward from the desired outcome to the conditions that would make that outcome possible. Developing a logic model was intended to be a process and a tool for clarifying assumptions among a group of people with varying, and potentially contradictory, perspectives on a problem that needs a solution.

<sup>40</sup> Paul Brest, “President’s Memo” (2004)



An aerial dancer from Zaccho Dance Theatre (Rapt Productions)

Brest's memo went on to outline how this framework was being incorporated into the foundation's grantmaking. Program staff had already used logic or causal modeling to focus their thinking about goals for each program, and how to achieve them as part of the programs' larger strategic planning process. Starting in 2005, logic models would go external: all Hewlett Foundation applicants would be asked to describe their proposals in terms of causal models, and grantees would be asked to evaluate their progress toward their designated outcomes in periodic reports.

Brest's hopes were high for achieving acceptance throughout the field of philanthropy of the language and concepts of Theory of Change, as expressed through logic models. Those hopes were challenged in the roll-out in the foundation in 2005. Not surprisingly, since the logic model was designed to aid problem-solving, Performing Arts grantees in the "core commitment" category had the hardest time adjusting, and the process of moving into the new way of thinking would prove arduous for some.

Arts Education was a different story. It responded beautifully to the logic model treatment. The 2006 "Budget Memorandum" reported on the joint activities with the Education Program. A thorough fact-finding process was initiated around the question: "could we help to ensure arts education for every child in California?" Answering "yes" to that question, and working backwards from that outcome, sent the Performing Arts Program in brand new directions.

This was an enormous departure for the Performing Arts Program on two fronts. First, geographically. Because of state politics, this was not a regional question, it had to encompass the entire state of California—a deeply embedded structure of interlocking interests underlies the subject of public education. And second, an effort to restore the arts to K-12 school children required going beyond the limitations of performing arts to include visual arts, new territory for the Program.

Eng took an imaginative leap into advocacy—a realm familiar to the other foundation programs, but new to Performing Arts. She included a logic model for the initiative, which continued to expand over the years, using a multi-pronged attack on the problem based on three strategies:

1. Study the landscape.
2. Advocate for public funding.
3. Assist district and county infrastructures in delivering arts education with grant support.



A performance by San Francisco Girls Chorus (San Francisco Girls Chorus)

The central action taken to address the first strategy was a joint effort with the Education Program to commission a study of the situation, “An Unfinished Canvas. Arts Education in California: Taking Stock of Policies and Practices.”<sup>41</sup> The groundbreaking study was the first comprehensive examination of the myriad ways in which the State of California had fallen short, not just of its acknowledged goals in arts education, but in comparison to the rest of the nation. The study has subsequently provided a roadmap for public and private efforts to work together to solve the problems identified, and represents a perfect exemplar of Heyns’ original vision for the foundation:

<sup>41</sup> K.R. Woodworth, H.A. Gallagher, and R. Guha, “An unfinished canvas. Arts education in California: Taking stock of policies and practices” (SRI International, 2007).

<sup>42</sup> Roger Heyns, “Policy and Procedures Memorandum to the Trustees” (1977).

Accordingly, the foundation will be especially sensitive to opportunities to improve the effectiveness of the institutions in our society, to assist in discovering solutions to problems that make the society less rewarding to its members.<sup>42</sup>

As Arts Education continued to thrive in the new environment, the Performing Arts Program tried to find a logic model that encompassed the hybrid nature of the Program itself. The difficulty of categorizing these multiple strands into a clear and consistent version of outcomes is illustrated by this period's Board docket, in which the Program tinkered continuously with its logic model, struggling to find the best combination of concepts and terms (goals, frameworks, strategies, outcomes) to contain the wide range of the Program's activities.

The worldwide 2008 recession was a game-changer. By 2009, a distinct belt-tightening characterized the Program. Eng projected a 40 percent decrease in grantmaking budget allocations (similar for all Programs), as compared to the 2008 budget.<sup>43</sup> To accomplish these drastic cuts, she proposed the elimination of several "clusters," including national service organizations and facilities, and substantial reductions in regranting of intermediaries that provided funds to individual artists and small arts organizations. Funding would also be cut for grantees that are "less likely to move us toward our outcomes, are poor performers, or are performing well and organizationally strong enough to withstand a reduction in funding." And, finally, several grantees would be slated for "tie-off" or "exit" grants. These latter grantees had been identified as no longer meeting the criteria for support, an idea that constituted a de facto answer to an old question, originally raised by the Board during Heyns' tenure, about the "renewal phenomenon."

One other notable development occurred during Eng's tenure—the slow and steady diversification of the portfolio to, as Beene's 2000 Memo characterized it, "broaden cultural participation." Instead of trying to overturn settled practice all at once, a tactic that had not worked for Peterson, Barclay, or Beene, Eng elected the slow, steady drip of each year simply adding a few new grantee organizations representing artistic excellence in a variety of cultural expressions that, in aggregate, dramatically widened the definition of performing arts on a practical level.

With the expansion of the portfolio, the Program staff expanded to five. Another staff change occurred during this period. A new title, program director, was instituted for the heads of all the programs in the foundation—Stockholm, Peterson, Barclay, Beene, and Eng all held the title of program officer. The title of program officer was retained for the position reporting to the program director.

In late 2009, Moy Eng reached the end of her term as program director, and her successor, John McGuirk was brought onboard.

McGuirk, unique among program directors, had served a previous tenure as program officer under Eng. Because of his previous experience, he knew the foundation, the logic of logic models, the dramatis personae, and he had the added advantage of having played a leadership role in developing the California Cultural Data Project (CDP), leading a consortium of forty-five California funders. He inherited the Program at a time characterized by yet more difficult funding choices, as the whole foundation continued to operate with a grants budget 40 percent below its peak.

McGuirk would not need the lengthy learning curve that was usual for new program directors, widely considered one of the disadvantages of the term-limit policy. (The other being the extended "lame duck" period toward the end of a program director's tenure.)

<sup>43</sup> Moy Eng, "Budget Reduction Memo" (2009).

He interpreted his mandate as one of “staying the course,” continuing Eng’s strategies of significant grant reductions for most organizations, and tie-off grants for another twenty-two organizations, some of which had been in the portfolio for years.<sup>44</sup> Additional strategies at this time included moving to a policy of grant proposals by invitation only,<sup>45</sup> and postponing the launch of a major Arts Education initiative.

But the times called for more:

Amid this new economic reality, the Performing Arts Program launched a process with Redstone Strategy Group to fine-tune our strategic framework based on outcome-focused grantmaking. Given that this planning process will take an estimated nine months, we see 2011 as a transitional year. Our current framework and logic model, developed in 2008 under Moy Eng’s leadership, will remain largely in place through 2011, while we create and position a new outcome-focused grantmaking framework for implementation in 2012.<sup>46</sup>

In this same memo, McGuirk pointed to the success of the Cultural Data Project (CDP), which supplied longitudinal data on the arts sector, and foresaw its potential to provide a quantitative method for measuring the value of the Hewlett Foundation’s granting investments. Under McGuirk’s leadership, CDP emerged as a powerful new tool to support outcome-focused grantmaking. It offered new methods of tracking progress of components of the Program toward defined outcomes by using two proxies: grant distribution by discipline and by region. CDP data also created a way to evaluate progress toward individual strategies by a thoughtful selection of metrics. And finally, the Program launched a project to determine the financial health and capital needs of Bay Area arts sector using financial data compiled by the CDP. The goal was to further refine strategies for strengthening the whole sector.

In 2012, on the eve of his retirement, Paul Brest wrote his annual “Presidents Essay” for the Board, providing a detailed description of the Theory of Change and the logic model methodology that had been the cornerstone of his presidency.

Let me begin by summarizing how we define our mission and position our work among the 90,000 foundations and millions of individual philanthropists in the United States. To capture our approach in a single phrase, the Hewlett Foundation is *outcome-oriented*.<sup>47</sup>

A useful companion document from 2012 is McGuirk’s “Performing Arts Program Strategic Framework 2012–2017,” which outlined the subject of Theory of Change and a refinement of the ideas as they relate specifically to the Performing Arts Program.



A scene from “Parable for a Dark Time,” presented by Golden Thread Productions. (Theodor Grover/ Golden Thread Productions)

<sup>44</sup> John McGuirk, “Budget Memorandum” (2011)

<sup>45</sup> This was changed within a few years to a more open process, initiated by a letter of inquiry (LOI), which still applies.

<sup>46</sup> John McGuirk, “Budget Memorandum” (2011)

<sup>47</sup> Emphasis in the original.

A newly articulated purpose for the Performing Arts Program emerged out of the effort to create the strategic framework: *to ensure continuity and innovation in the performing arts through the creation, performance, and appreciation of exceptional works that enrich the lives of individuals and benefit communities throughout the Bay Area.* In addition, new language was developed to categorize Performing Arts Program activities for tracking progress toward outcomes:

- Continuity and Engagement
- Arts Education
- Infrastructure

This new category—Infrastructure—called for taking a leadership role in identifying and researching issues confronting the field of cultural philanthropy for the benefit of the entire field:

Building on our new strategic framework, we also launched three major research projects designed to understand the arts ecosystem and the specific role our grantees play within it: “Capitalization Indicators and Analysis of the Program’s Portfolio;” “The Faces of the Future: An Assessment of California’s Next Gen Emerging Arts Leadership Initiative;” and “Collecting Standardized Demographic Information.”<sup>48</sup>

All three categories—Continuity and Engagement, Arts Education, and Infrastructure—would prove useful and enduring. They survived the foundation-wide changes to come and are still in use in 2016.

One additional noteworthy priority identified in the new strategic framework was to seek out community-based organizations focused on arts engagement in high-risk neighborhoods and disadvantaged communities in the region. This was another strategy aimed at the goal of ensuring a portfolio that represented the cultural diversity of the San Francisco Bay Area:

For the first time in several years, we added a cluster of new grantees in the Serving Bay Area Communities component. These organizations were identified through county-level scans by Program staff, in conversation with regranting intermediary partners. As prioritized in our new strategic framework, we sought community-based organizations focused on arts engagement in high-risk neighborhoods and disadvantaged communities in our regions. These organizations continue to diversify the types and aesthetics of performing arts organizations within our portfolio to represent the changing demographics of the Bay Area.<sup>49</sup>

During this time, as program activities continued to expand under McGuirk’s leadership, the staff increased to six.

Upon Brest’s retirement in 2012, a new president, Larry Kramer, came to the Hewlett Foundation, fresh from the position of dean of the Stanford Law School.

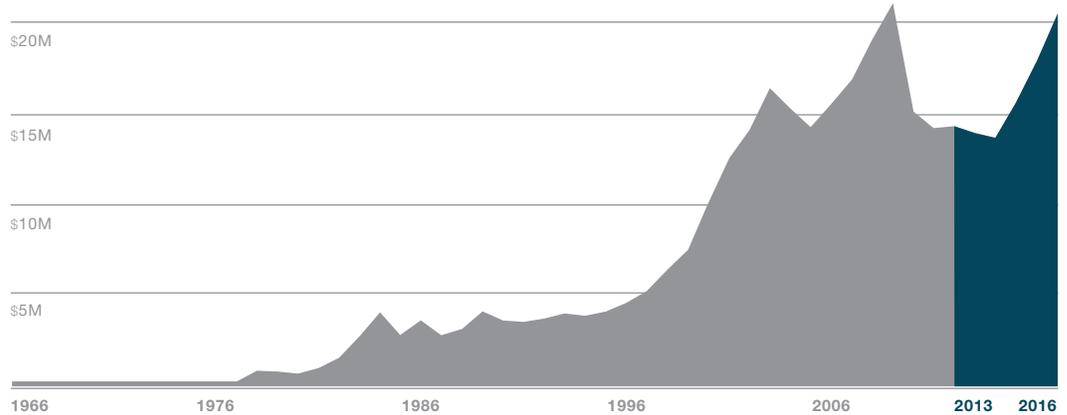
<sup>48</sup> Ibid.

<sup>49</sup> John McGuirk, “Budget Memorandum” (2013)

## viii. NEW PERSPECTIVES

2013 to 2016

TOTAL ARTS GRANTS	
2013	\$13,363,327
2014	\$14,820,000
2015	\$17,706,000
2016	\$17,200,000



The new president, Larry Kramer, soon made known his intention to tinker with Outcome-Focused Grantmaking (OFG) as the operating paradigm of the Hewlett Foundation.

[Board members should anticipate] some experiments with or adjustments to the highly specified form of outcome-focused grantmaking that has characterized the Hewlett Foundation’s work in recent years—in some respects a refinement, in others a loosening through the introduction of heterogeneity into our practice. I see these decisions as first efforts to open a broader conversation/exploration that I hope to begin with you about the foundation’s mission and role in the philanthropic sector.<sup>50</sup>

The next Board docket, for November 2013, represented a complete re-think of how to present the complex realities of foundation activities to the Board in a fresh, new user-friendly format. Logic models were gone, replaced by bold graphics focusing on big picture elements of the foundation’s operations that were most useful for evaluating how things were going.

<sup>50</sup> Larry Kramer, “President’s Memo” (2013).



A West African dance class performance at East Bay Center for the Performing Arts in Richmond (Michelle Flynn)



A performance by San Jose Taiko (San Jose Taiko)

A new graphic Strategy Overview of all programs, with a single mission for each, made it easy to see the totality of foundation operations at a glance. Colorful pie charts showed allocations each year for each program and all the initiatives, making clear the interrelationships between the many foundation endeavors. Everything was carefully designed for ease of use, with materials for the Board available digitally for the first time. The simplified format allowed data to be presented with less emphasis on individual grants, and more on trends and insight, a particular boon for the Performing Arts Program, with its many moving parts.

These were far more than cosmetic changes. They represented a new way of thinking about the foundation’s work, as Kramer communicated to the Board in 2014. Kramer paid homage Brest’s achievements in the field of “strategic philanthropy,” or the Outcome-Focused Grantmaking that had been such a prominent feature of his contributions to philanthropy. Given the successes of this focus on outcomes, Kramer goes on to say:

Many of our strategies have been formulated with theories of change that presume a kind of predictive linear causation: if we do X then Y will follow. One sees this in the logic models used, which sketch assumptions that lead directly from making grants to outputs and, from there, to ultimate outcomes. Often, this is a fair assumption...but predictions based on linear causation become less plausible when dealing with complex social systems...[which] call for a more experimental approach in which we simultaneously try different things and explore multiple pathways—“spreading small bets”—then observe what happens and adjust as we go. This more adaptive approach to strategic grantmaking, sometimes termed “emergent” strategy, acknowledges greater uncertainty—and requires more persistence on the part of funders—than has sometimes been the case with conventional forms of strategic philanthropy.<sup>51</sup>

<sup>51</sup> Larry Kramer, “President’s Memo” (2014).

Kramer’s approach took form as a presentation to the Board in June 2015, on the subject of what he re-named “Outcome-Focused Philanthropy” (OFP):

While not discarding the basic precepts of OFG—setting clear goals, making sure we have a plausible plan of action to achieve those goals, and establishing systems for monitoring and evaluating progress—we are moving toward an approach that modifies and (we believe) improves it. First, and most important, we propose to extend the process beyond the initial development of a strategy by providing structured guidance that encompasses the strategy’s full lifecycle (including, in other words, its implementation, refreshment, and termination). Second, we intend to replace OFG’s specified ten steps with a more fluid approach organized around relevant guiding questions and recommendations for process and work product. Between these, and a myriad of smaller adjustments, our strategic efforts should become both more flexible and more comprehensive—a shift we deem significant enough to warrant broadening the designation to “Outcome-Focused Philanthropy,” or OFP.

In developing Outcome-Focused Philanthropy, we’ve taken OFG’s good genes and sought to make the organism even better by adding greater flexibility, clarity, and cohesiveness.<sup>52</sup>

The history of the next fifty years of the Performing Arts Program will chronicle the results of these changes.

In the meantime, the achievements of the last fifty years are clear.

From 1966 to 2016, the William and Flora Hewlett Foundation distributed a total of \$335 million in grants to performing arts organizations in the eleven counties that constitute the greater San Francisco Bay Area. In all respects but this, the foundation’s impact on the performing arts in the region is immeasurable. Its innovations—a commitment to building organizational strength by providing sustained general operating grants renewable over multiple years, and focusing exclusively on the performing arts and its infrastructure in a defined geographical region—make it unique among foundations of any size.

The history of the past fifty years testifies to the fact that the Performing Arts Program will continue to find creative ways to respond to the radical changes that characterize the times in which we live, and to continue to assure a healthy, flourishing field of the performing arts for the next fifty years and beyond.

The work continues.

<sup>52</sup> Larry Kramer, “President’s Memo” (2015).

## ix. APPENDICES

### A. Dramatis Personae

William Hewlett *Chair of the Board of Trustees, 1966–1994*

Walter Hewlett *Chair of the Board of Trustees, 1994–2014*

Stephen C. Neal *Chair of the Board of Trustees, 2015 to present*

John May *Advisor to the Board of Trustees, 1973–1976*

Dr. Roger Heyns *President, 1977–1992*

David Pierpont Gardner *President, 1993–1998*

Paul Brest *President, 1999–2012*

Larry Kramer *President, 2012 to present*

Virginia Hubbell *Consultant in Arts and Humanities,<sup>53</sup> 1978–1980*

Gail Stockholm *Program Officer of the Arts and Humanities Program,<sup>54</sup> 1980–1982*

Eric Peterson *Program Officer of the Performing Arts Program,<sup>55</sup> 1982–1987*

Barbara M. Barclay *Program Officer of the Performing Arts Program, 1987–1996*

M. Melanie Beene *Program Officer of the Performing Arts Program, 1996–2001*

Susan Duncan *Program Associate, 2000*  
*Acting Co-Program Officer of the Performing Arts Program, 2001*  
*Program Officer, 2002<sup>56</sup>*

Andrea Faiss *Program Associate, 2000–2001*  
*Acting Co-Program Officer of the Performing Arts Program, 2001*  
*Program Officer, 2002–2007*

Moy Eng *Program Director of the Performing Arts Program, 2002–2010*

John E. McGuirk *Program Officer, 2002–2005*  
*Program Director of the Performing Arts Program, 2010 to present*

<sup>53</sup> “Arts and humanities” was still designated as an “area of interest” rather than a program.

<sup>54</sup> Arts and Humanities was designated a program in this interval.

<sup>55</sup> The name was changed to Performing Arts Program at this point.

<sup>56</sup> Titles and responsibilities for Duncan and Faiss changed several times. The title for the leader of the foundation’s programs shifted in this period from “program officer” to “program director.” The title of program officer was not abandoned, but given to staff reporting to the program director.

**In addition, over the years a number of gifted and dedicated staff made the events of this history possible:**

Linda Clayton *Program Associate, 2012–2013*

Julie Fry *Program Officer, 2007–2015*

Alexa Hall *Program Fellow, 2016 to present*

Roberta (Bobbi) Horsley Green *Program Assistant, 1988–2002*

Sheena Johnson *Program Fellow, 2013–2015*

Christina Knight *Program Fellow, 2005–2006*

Brenda MacRoberts *Program Assistant, 2000–2001*

Jessica Mele *Program Officer, 2015 to present*

Kerry O'Connor *Program Assistant, 2002-2008; Program Associate, 2008 to present*

Toni O'Hare *Program Assistant, ca. 1984–1988*

Emiko Ono *Program Officer, 2011 to present*

Kathleen D. Pace *Program Assistant, 1998–2000*

Shireen Pasha *Associate Program Officer, 2007–2008*

Ron Ragin *Associate Program Officer, 2008–2011; Program Officer, 2011–2014*

Reuben Roqueñi *Program Officer, 2014-2017*

Marc Vogl *Program Officer, 2007–2011*

Natasha Terk *Program Associate, 1998–2000*

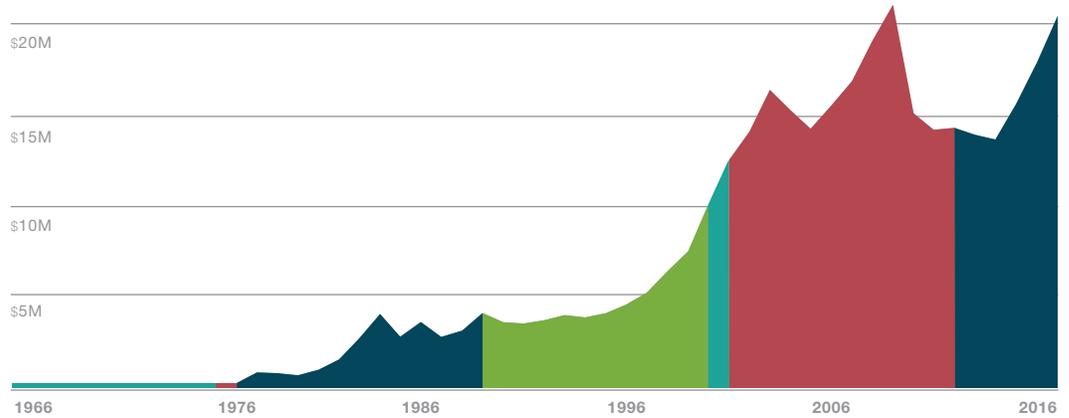
Marlene Zapata *Program Associate, 2013–2016*



Green Music Center at Sonoma State University (Green Music Center)

## B. Tables

### Performing Arts Grants Data: 1966 to 2016



#### 1966 to 1976

1967	\$70,000
1968	\$10,000
1969	\$15,000
1970	\$10,000
1971	\$15,000
1972	\$10,000
1973	\$25,000
1974	\$25,000
1975	\$86,083
1976	\$157,322
1977	\$32,000

#### 1978 to 1989

1978	\$919,025
1979	\$843,102
1980	\$714,980
1981	\$955,229
1982	\$1,515,529
1983	\$2,770,000
1984	\$4,056,500
1985	\$3,047,000
1986	\$3,648,000
1987	\$2,807,000
1988	\$3,269,500
1989	\$4,075,000

#### 1990 to 2000

1990	\$3,600,000
1991	\$3,600,000
1992	\$3,850,000
1993	\$4,015,000
1994	\$3,925,000
1995	\$4,250,000
1996	\$4,750,000
1997	\$5,475,000
1998	\$6,850,000
1999	\$7,881,100
2000	\$10,126,000
2001	\$12,844,000

#### 2002 to 2012

2002	\$14,461,000
2003	\$16,228,400
2004	\$18,216,500
2005	\$14,985,500
2006	\$16,151,250
2007	\$18,216,500
2008	\$20,938,355
2009	\$15,214,020
2010	\$14,100,149
2011	\$14,173,145
2012	\$13,942,075

#### 2013 to 2016

2013	\$13,363,327
2014	\$14,820,000
2015	\$17,706,000
2016	\$20,200,000

## 1966 to 2016 TOTAL

# \$335,744,091

# Hewlett Foundation Performing Arts Program Grantees

Past and Present, as of October 16, 2016

1stACT Silicon Valley  
42nd Street Moon  
Abhinaya Dance Company of San Jose  
Affiliate Artists  
Afsaneh Art & Culture Society - Ballet Afsaneh  
Alameda County Arts Commission  
Alameda County Office of Education  
Ali Akbar College of Music  
Alliance for California Traditional Arts  
Alonzo King Lines Ballet  
Alternate Roots  
American Association of Museums  
American Bach Soloists  
American Ballet Theatre  
American Composers Forum of San Francisco  
American Composers Orchestra  
American Conservatory Theater  
American Dance Festival  
American Indian Film Institute  
American Musical Theater Festival  
American Musical Theatre of San Jose  
American Public Media  
American Symphony Orchestra League  
Americans for the Arts  
API Cultural Center Inc.  
Arab Cultural and Community Center  
Arab Film Festival  
Architectural Foundation of San Francisco  
Arts Council for Monterey County  
Arts Council Napa Valley  
Arts Council Santa Cruz County  
Arts for LA  
Ashkenaz Music and Dance Community Center  
Asian Art Museum of San Francisco  
Aspen Music Festival and School  
Association of American Cultures  
Association of California Symphony Orchestras  
Association of Performing Arts Presenters  
Atlatl  
Aurora Theatre Company  
AXIS Dance Company  
Ballet San Jose Silicon Valley  
Bay Area Music Archives  
Bay Area Performing Arts Spaces  
Bay Area Theatresports  
Bay Area Video Coalition  
Bay Chamber Symphony  
Berkeley City Ballet  
Berkeley Repertory Theatre  
Berkeley Stage Company  
Berkeley Symphony Orchestra  
Bernard Osher Marin Jewish Community Center  
Black Choreographers Moving  
Black Filmmakers Hall of Fame  
Boston Symphony Orchestra  
Brava! for Women in the Arts  
Bread and Roses Benefit Agency  
Broadway By the Bay  
Business-Arts Council  
Cabrillo Festival of Contemporary Music  
Cal Humanities  
Cal Performances at UC Berkeley  
California Alliance for Arts Education  
California Arts Council  
California Assembly of Local Arts Agencies  
California College of the Arts  
California County Superintendents  
Educational Services Association  
California Education Partners  
California Film Institute  
California Institute of the Arts  
California Jazz Conservatory  
California Lawyers for the Arts  
California Poets in the Schools  
California Presenters  
California Shakespeare Theater  
California State PTA  
California State Summer School Arts Foundation  
California Summer Music  
California Symphony Orchestra  
Californians for the Arts  
Carmel Bach Festival  
Carnegie Hall  
Cazadero Performing Arts Camp



A class at Community Music Center in San Francisco (Community Music Center)

Center for Asian American Media  
Center for Cultural Innovation  
Center for World Music  
Centerspace Dance Foundation  
Chamber Music America  
Chhandam Chitresh Das Dance Company  
Children's Theatre  
Chinese Cultural Productions  
Chorus America  
Cinnabar Arts Corporation  
Circuit Network  
Circus Center  
City Lights Theater Company of San Jose  
City of Berkeley Civic Arts Commission  
City of Oakland Cultural Affairs Commission  
City of San Jose Office of Cultural Affairs  
Classics for Kids Foundation  
Climate Theater  
Community Art Stabilization Trust  
Community Foundation of Santa Cruz County  
Community Foundation of the Napa Valley  
Community Initiatives  
Community Music Center  
Community School of Music and Arts  
Council of Chief State School Officers  
CounterPulse  
Creative Capital Foundation  
Crosspulse  
Crowden Music Center  
Crucible  
Cultural Arts Council of Sonoma County  
Cultural Data Project  
Cutting Ball Theater  
Cypress Performing Arts Association  
Dance Palace  
Dance Through Time  
Dance/USA  
DanceArt  
Dancers Group  
Dancers Stage Company  
Dell'Arte Players  
Della Davidson Dance Company  
Destiny Arts Center  
Diablo Light Opera Company  
Diablo Regional Arts Association  
Diamano Coura West African Dance Company  
Dimension Performing Arts  
Dimensions Dance Theater  
Djerassi Resident Artists Program  
Door Dog Music Productions  
Early Music America  
Earplay  
East Bay Center for the Performing Arts  
East Bay Community Foundation - Fund for Artists  
East Bay Performing Arts  
Eastside Arts Alliance  
Eighty Langton Street/New Langton Arts  
El Campanil Theatre Preservation Foundation  
El Teatro Campesino  
El Teatro de la Esperanza  
Emerging Arts Leaders Los Angeles  
Envision Education Inc.  
Epiphany Productions Sonic Dance Theater  
Ethiopian Community Services  
Eureka Theatre  
EXIT Theatre  
Exploratorium  
Festival Opera Association  
Film Arts Foundation  
Firebird Youth Chinese Orchestra  
Firehouse Theater Company  
First Voice  
Flyaway Productions  
Folger Library  
Foothill-DeAnza Festival of the Arts  
Fort Mason Center  
Foundation for Independent Video and Film  
Fractured Atlas Productions  
Frameline  
Freight & Salvage:  
Berkeley Society for the Preservation of Traditional Music  
Fremont Symphony Orchestra  
Fresh Meat Productions  
Fresno County Office of Education

Friends of Golden Gate Library  
Friends of Olympia Station, Inc.  
Friends of Photography  
Fund for Folk Culture  
Gamelan Sekar Jaya  
George Coates Performance Works  
Ghiberti Foundation - Grace Cathedral  
Golden Gate Performing Arts - SF Gay Men's Chorus  
Golden Gate University  
Golden Thread Productions  
Good Sound Foundation  
Grantmakers in the Arts  
Harvard University  
Headlands Center for the Arts  
Hidden Valley Music  
Hillbarn Theater  
Hispanic Foundation of Silicon Valley  
Horizons Foundation  
Humanities West  
Humboldt Area Foundation - Native Cultures Fund  
Idris Ackamoor and Cultural Odyssey  
Institute of the American Musical  
Institute for Urban Design  
Institute of Noetic Sciences  
Intertribal Friendship House  
Intersection for the Arts  
Ives Quartet  
Jacob's Pillow Dance Festival  
Janlyn Dance Company  
Jazz at Lincoln Center  
Jazz in the City  
Joe Goode Performance Group  
José Limón Dance Foundation  
Julia Morgan Center for the Arts  
June Watanabe in Company  
Kaisahan Dance Company of San Jose  
Kala  
KALW Public Radio  
Kansas City Symphony  
Kennedy Center for the Arts  
KITKA  
Knights of Indulgence Theatre - The Imaginists  
Koncepts Cultural Gallery  
KQED  
Kronos Performing Arts Association  
Kuumbwa Jazz Society  
La Peña Cultural Center  
La Pocha Nostra  
Lamplighters Opera West Foundation  
Larkin Street Youth Services  
Lawrence Pech Dance Company  
Leap Imagination in Learning  
Life on the Water  
Living Jazz  
Lobster Theater Project  
Loco Bloco Drum and Dance Ensemble  
Long Now Foundation  
Los Altos Conservatory Theatre  
Los Angeles County Arts Commission  
Los Cenzontles Mexican Arts Center  
Luna Dance Institute  
MacFarland/Whistler Dance Art Company  
Magic Theatre  
Magnificat!  
Make\*A\*Circus  
Margaret Jenkins Dance Company  
Marin Arts Council  
Marin Community Foundation  
Marin Shakespeare Company  
Marin Symphony Association  
Marin Theatre Company  
MarinLink, Inc.  
Meadowood Music Camp  
Meet the Composer  
Mendocino Arts Center  
Metropolitan Opera  
Mexican Heritage Corporation  
Midsummer Mozart  
Montalvo Association  
Monterey County Symphony  
Monterey Jazz Festival  
Mother Iode Musical Theatre  
Movimiento de Arte y Cultura Latino Americana  
Mural Music and Arts Project



Dancers during a performance by Gamelan Sekar Jaya (Ben Belknap)

Musequality  
Museum of Performance & Design  
Music at Kohl Mansion  
Music National Service Initiative  
Music@Menlo  
Musical Traditions - Paul Drescher Ensemble  
Na Lei Hulu I Ka Wekiu Hula Halau  
Napa Valley Symphony Association  
National Alliance for Media Arts and Culture  
National Arts Strategies  
National Association of State Boards of Education  
National Free Day of Theater  
National Guild for Community Arts Education Inc.  
National Opinion Research Center  
National Performance Network  
National Steinbeck Center  
National Symphony  
Native Arts and Cultures Foundation  
Network of Ensemble Theaters  
New Century Chamber Orchestra  
New Conservatory Theatre  
New England Foundation for the Arts  
New Music USA  
New York City Opera  
New York Public Library  
Ninth Street Media Consortium  
Nonprofit Finance Fund  
Noontime Concerts  
Northern California Community Loan Fund  
Northern California Grantmakers: Arts Loan Fund  
Oakland Ballet  
Oakland Interfaith Gospel Choir  
Oakland Museum of California  
Oakland Opera Company  
Oakland Youth Chorus  
ODC  
Old First Center for the Arts / Old First Concerts  
Opera America  
Opera San Jose  
Oregon Shakespeare Festival  
Oriki Theater  
Other Minds  
Pacific Chamber Symphony  
Pacific Film Archive  
Pajaro Valley Performing Arts Association  
Palo Alto Art Center Foundation  
Palo Alto Chamber Orchestra  
Pataphysical Broadcasting Foundation  
Peninsula Ballet Theatre  
Performing Arts Workshop  
Philharmonia Baroque Orchestra  
Piedmont Choirs  
PlayGround  
Playwrights Foundation  
Pocket Opera  
Project Bandaloop  
Queer Cultural Center  
Queer Women of Color Media Arts Project  
Ragazzi The Peninsula Boys' Chorus  
Red Poppy Art House  
Rhythmix Cultural Works  
Robert Moses' Kin  
Rova:Arts  
RYSE Center  
San Domenico School  
San Francisco Arts Commission  
San Francisco Ballet  
San Francisco Bay Area Emerging Arts Professionals  
San Francisco Boys Chorus  
San Francisco Chanticleer  
San Francisco Cinematheque  
San Francisco Classical Voice  
San Francisco Conservatory of Music  
San Francisco Contemporary Music Players  
San Francisco Early Music Society  
San Francisco Film Society  
San Francisco Foundation  
San Francisco Friends of Chamber Music  
San Francisco Grants for the Arts  
San Francisco Girls Chorus  
San Francisco Jazz Organization  
San Francisco Jewish Film Festival  
San Francisco Live Arts  
San Francisco Mime Troupe

San Francisco Museum of Modern Art  
San Francisco Opera  
San Francisco Performances  
San Francisco Performing Arts Library & Museum  
San Francisco Redevelopment Agency  
San Francisco Repertory Theater  
San Francisco School of Dramatic Arts  
San Francisco Sinfonietta  
San Francisco Study Center  
San Francisco Symphony  
San Jose Children's Musical Theater  
San Jose Cleveland Ballet  
San Jose Jazz  
San Jose Multicultural Artists Guild  
San Jose Museum of Art  
San Jose Repertory Theatre  
San Jose Stage Company  
San Jose Symphony  
San Jose Taiko  
San Mateo County Arts Commission  
San Mateo County Community Colleges Foundation  
San Mateo Historical Association  
San Mateo Performing Arts Center  
Santa Clara County Office of Education  
Santa Cruz County Symphony Association  
Santa Cruz Museum of Art and History  
Santa Cruz Shakespeare Festival  
Santa Fe Chamber Music  
Santa Fe Opera  
Santa Rosa Symphony  
Schola Cantorum  
Scholar Opera  
School of American Ballet  
School of Arts and Culture at Mexican Heritage Plaza  
Seattle Symphony  
Seventh Generation Fund  
SEW Productions / Lorraine Hansberry Theatre  
ShadowLight Productions  
Shakespeare San Francisco  
Shotgun Players  
Silicon Valley Creates  
Silicon Valley Education Foundation  
Sinfonia San Francisco  
Slow Food USA  
Smuin Ballets/SF  
Snake Theater  
Solano County Office of Education  
Somos Mayfair  
Sonoma County Community Foundation  
Sonoma County Repertory Theater  
Sonos Handbell Ensemble  
SOON 3  
Spectrum Foundation/SF Pipe Organ  
SRI International  
Stagebridge  
Stanford Archive of Recorded Sound  
Stanford Committee on Black Performing Arts  
Stanford Jazz Workshop  
Stanford Live  
Stern Grove Festival Association  
Streetside Stories  
Studio Eremos  
Sundance Institute  
Talent Bank Foundation  
Tannery Arts Center  
Teaching Artists Guild  
Teatro Visión  
The Jewish Theatre San Francisco  
The Marsh: A Breeding Ground for New Performance  
The Santa Rosa Players: 6th Street Playhouse  
The.art.re.grüp, The LAB  
Theater Artaud  
Theatre Bay Area  
Theatre Bay Area - CA\$H Program  
Theatre Communications Group  
Theatre Flamenco  
Theatre of Yugen  
Theatre Rhinoceros  
TheatreWorks  
Thick Description  
Threepenny Review  
Tibetan Association of Northern California  
Tides, Inc.  
UCLA Nakamichi Festival  
US Santa Barbara Krenek Festival  
University of San Francisco



A dancer with Lily Cai Chinese Dance Company performs in *Strings Calligraphy* (Lily Cai Chinese Dance Company)

University of Southern California  
Upstart Stage  
Urban Institute  
Vallejo Symphony Association  
Valley Institute of Theatre Arts  
Vocal Arts Institute  
Wallace Alexander Gerbode Foundation  
Walter and Elise Haas Fund: Creative Work Fund  
Wells Fargo Center for the Arts  
West Bay Opera Association  
Westboro Music Festival  
Western Association of Art Museums  
Western Association of Schools & Colleges  
Western Folklife Center  
Western Stage at Hartnell College  
Willows Theatre Company  
Winifred Baker Chorale  
Women's Audio Mission  
Women's Philharmonic  
World Arts West  
Yale University  
Yerba Buena Arts and Events  
Yerba Buena Center for the Arts  
Young Audiences  
Young Audiences of Northern California  
Young Audiences of San Jose and Silicon Valley  
Young Audiences of San Diego  
Young Musicians Choral Orchestra  
Youth in Arts  
Youth Movement Records  
Youth Radio  
Youth Speaks  
Z Space Studio  
Zaccho Dance Theatre  
Zakros Productions New Music Theater  
Zawayá  
Zellerbach Family Foundation: Community Arts Fund  
Zero1  
Zeum  
Zohar Dance Company  
Zuni: A Shiwi Publishing

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— Laurie MacDougall

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