

# Report on 2020 Direct Charitable Activities

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

In 2020, foundation-wide expenses for DCAs totaled \$4,708,177 for 70 projects. Compared to 2019, this represents a 22% decrease in total dollars spent and a 23% decrease in the number of projects. The most common uses of DCAs were conducting research, convening conferences, providing technical assistance to grantees, and disseminating research findings. This report provides details of DCA expenses by program, and describes DCA projects with expenses greater than \$100,000.

## **Program: Cyber**

**Active Projects: 10**

**DCA Expenses: \$579,520**

### **Capacity-Building Support for Cyber Initiative Grantees (\$204,500)**

The consultant, Michael D. Rubin & Associates, provided capacity-building and fundraising support for Cyber Initiative grantees.

### **Cyber Initiative Media Roundtable 2020 (\$151,472)**

The consultant, Hamilton Place Strategies, worked on a foundation-branded media roundtable focused on cyber policy. The event includes participants from media, industry, academia, government, and civil society in the cyber field.

## **Program: Economy and Society**

**Active Projects: 1**

**DCA Expenses: \$20,001**

## **Program: Education**

**Active Projects: 17**

**DCA Expenses: \$1,617,980**

### **Formative Evaluation of Open Education Networks (\$221,568)**

edBridge Partners performed a formative evaluation of open education networks that is valuable to the Open Educational Resources (OER) field, in addition to the Education team. The project clarified how and how well different networks are serving the needs of different communities, as well as whether and to what extent participation in them facilitates OER adoption and use. The results provided leaders and organizers of networks with evidence to inform how they can adapt to continue to meet the needs of their target audiences. In addition, the consultant organized a series of Dialogue Days to bring together OER network stakeholders to discuss their vision for OER and their networks going forward. The final evaluation report will be shared with the field, bringing transparency to the process, as well as providing information on lessons learned and opportunities that exist for the sector.

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## **2020-2021 Open Educational Resources (OER) Communications Support (\$219,000)**

GMMB developed a communications plan to promote more effective use, by educators, of openly licensed content, tools, and services. The consultant helped K-12 districts and postsecondary institutions implement and sustain OER, practices, and policies that promote a diverse and inclusive global field for sharing open content, practices, and resources. The work focused on three core communications strategies: raising awareness of OER, overcoming perceived obstacles to using OER, and getting users to recommend OER to their peers.

## **Designing and Supporting the Development and Implementation of a Learning Agenda (\$206,500)**

FSG developed a learning agenda to both inform the Education team and serve the field of education, including Education Program grantees. A field-facing learning agenda is a key component of the K-12 Teaching & Learning strategy, which is focused on understanding how education systems can be transformed to support and deliver deeper learning. FSG designed and organized an approach for engaging grantees and partners around common learning objectives, and also recommended approaches for how the field can learn about issues relevant to transformation efforts, such as how to coordinate and sustain long-term funder support for systemic, large-scale education reform; how community partnerships limit or increase the impact of district transformation efforts; and the role and impact of including community voice in education transformation. Results were documented and shared publicly with the field.

## **Field Learning and District Support (\$179,124)**

FSG organized and facilitated a set of meetings, and designed and distributed a set of tools to engage the field and elicit advice and input on learning and research design. The goal was to answer questions about how school districts transition to online learning; the role of partners and experts in supporting district transformation efforts; the use of data and information; and effective engagement approaches.

## **Building an Open Education Learning Agenda with and for the Open Education Field (\$136,618)**

Redstone Strategy Group drafted a field-facing learning agenda that outlines key research questions and activities to help inform the field's collective work on bringing Open Educational Resources (OER) into classroom practice. The project directly supports outcomes in the OER strategy's field-building substrategy by helping the field target and shape research initiatives that support its continued growth. Results were shared with the field, including several grantees and OER experts, through an open, community-owned learning agenda document and stakeholder meetings.

## **ORS to Support Strategic Learning for the Field (\$116,063)**

ORS Impact is a nationally recognized leader in outcome-based planning and evaluation. ORS served as a strategic learning partner for the field, with a focus on organizations who work to include the voices of marginalized members and communities in education policy and reform discussions. ORS' work included participating in and facilitating a session during an initial convening, facilitating a work session, and reviewing organizations' existing grant and strategy documents. This culminated in an initial theory of change and strategic learning plan.

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## **Proof Points Meetings (\$114,655)**

These funds were used to conduct educational conferences and seminars, provide technical advice, and promote information sharing between grantees and other charitable organizations, and to publish and disseminate to the education community and the public, results of reports and research from exemplary K-12 schools, that show how deeper learning is an attainable and necessary goal for all students.

### **Program: Environment**

**Active Projects: 8**

**DCA Expenses: \$210,015**

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

**Active Projects: 7**

**DCA Expenses: \$887,000**

## **The Ouagadougou Partnership (OP) Coordination Unit for Family Planning Francophone West Africa (\$400,000)**

Redstone Strategy Group assisted the Ouagadougou Partnership's Coordination Unit as it implements a new OP strategy in 2021, including help with launching a Civil Society Organizations (CSO) strategy, continuing a youth strategy, developing an OP advisory board, embarking on several new activities to assist countries and donors, hiring a CSO support person, and transitioning support services from IntraHealth International to a regional entity.

## **Population Works Africa: Anti-racist Solidarity Centered Approaches to Philanthropy for SRHR and Reproductive Equity Donors (\$122,000)**

Given the increased interest in interrogating how power operates in global development, and momentum in finding approaches to infusing principles of solidarity into funding spaces, Population Works Africa developed a community of practice to provide sexual reproductive health and rights and reproductive equity donors with opportunities to learn and contribute to new approaches.

## **Redstone Strategy Group: to Develop a Strategic and Organizational Development Plan for the Ouagadougou Partnership Beyond 2020 (\$107,000)**

Redstone led a consultative process with current Ouagadougou Partnership members, including countries, donors, and key implementing partners, to build a strategy "Beyond 2020" for the partnership. The project resulted in a strategic and organizational development plan for the partnership as it continues to support countries and donors pursuing a contraceptive revolution in Francophone West Africa.

## **David Barkan: Transition Consultancy for Multifunded Partnership (\$100,000)**

David Barkan worked to instill continued confidence in the Rapid & Responsive Evidence Partnership project among partners and the broader field, as well as generate ongoing momentum while supporting renewal of the partnership design.

## **Overseas Development Institute: Researching the Needs of Grassroots Legal Empowerment Organizations (\$100,000)**

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Overseas Development Institute identified potential models for donor collaboration to provide long-term sustainable and predictable funds for the grassroots legal empowerment field, especially in Africa, Asia, and Latin America. Consultant provided a public report and slide deck on findings, with focus on needs of the field, consideration of key design features of possible pooled funding models, key risks of such models, and mitigation strategies and recommended next steps.

**Program: Performing Arts**

**Active Projects: 5**

**DCA Expenses: \$400,468**

**AB5's Impact on Independent Workers and Employees in California (\$155,710)**

Research was commissioned from Center for Cultural Innovation on the impacts of newly enacted California legislation (AB5), as related to independent workers and employees in California. A report containing recommendations to support arts organizations and artists was produced and disseminated.

**Program: Effective Philanthropy**

**Active Projects: 3**

**DCA Expenses: \$112,300**

**Program: Special Projects**

**Active Projects: 12**

**DCA Expenses: \$622,343**

**Supporting Social Innovation in CA (\$150,000)**

Freedman Consulting identified opportunities for supporting social innovation in California through public-philanthropic partnerships.

**True Cost Initiative (\$105,619)**

The True Cost Initiative is a funder collaborative with the Hewlett Foundation joining as a participant and steering group member along with other foundations. The purpose of the initiative is to create collective research, learning insight, and action regarding indirect cost rates in project grants, funding models, and the nonprofit starvation cycle. The work aimed at building, expanding, and utilizing our collective “community of practice” to advance work within each of our organizations and across the sector in this topic area. Additional costs for this work can include expenses for hosting meetings and consulting to provide communications support to amplify this work in the field.

**Program: U.S. Democracy**

**Active Projects: 7**

**DCA Expenses: \$258,550**