

Report on 2013 Direct Charitable Activities

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

In 2013, Foundation-wide expenses for DCAs totaled \$5,069,727 for ninety-eight projects. This is a .5 percent decrease in total dollars since last year and a 29 percent increase in the number of projects. The most common uses of DCAs were conducting research, convening conferences, providing technical assistance to grantees, and disseminating research findings. This report provides details of DCA expenses by program and describes DCA projects with expenses greater than \$100,000.

Program: Education

Active Projects: 42

DCA Expenses: \$1,988,155

AEE Host of DL Grantee Meeting (\$213,564)

Alliance for Excellent Education coordinated, hosted, and facilitated the 2013 Hewlett Foundation Deeper Learning grantee meeting in Coronado, California, to further advance Deeper Learning strategic goals, including field building and networking. Hewlett Foundation grantees, other foundations, and education experts participated.

The Common Pool, Item Development Program (\$200,000)

A consultant designed, developed, and oversaw the launch of a program to invite educators and others to submit innovative testing items to an online platform. The platform provided the two major assessment consortia—the Partnership for Assessment of Readiness for College and Careers, and the Smarter Balanced Assessment Consortium—with new testing items as they transitioned states to online assessments aligned with the Common Core State Standards.

Education Counsel, Policy Framework to Advance Deeper Learning 2013 (\$219,000)

A consultant assisted the Hewlett Foundation's core grantees in field building, provided entrepreneurial policy support, and identified, advanced, and addressed challenges and opportunities to accelerate deeper learning policy reforms and the implementation of Common Core standards and assessments.

Education First, Common Core Funders Working Group (\$129,000)

Education First Consulting, LLC provided assistance to foundations interested in collectively supporting states and school districts as they implement the new Common Core State Standards through the creation of a Common Core Funders Working Group, a subset of the Education Funders Strategy Group. Education First conducted interviews to identify implementation barriers at the national, state, and local levels; created a field map for funders and education experts to help them better understand the gaps and possible overlaps in funding; facilitated several Working Group meetings over several months; and provided research, coordination, and field building to the Working Group to advance its goals and priorities.

REACH Strategies Communication Plan (\$106,000)

A consultant provided services including: creating a communications dashboard for the field; performing a communications capacity assessment for grantee technical assistance; providing

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ongoing social media support, such as increasing Twitter activity; and creating a “champions campaign” for deeper learning to be shared in the field.

Program: Environment

Active Projects: 8

DCA Expenses: \$453,556

Special Initiative: Increase Clean Transportation 2013 (\$214,148)

The goal of this initiative was to promote sustainable transportation in developing countries, such as Mexico and Brazil, as well as the United States, by hosting conferences and meetings to discuss, among other topics, global air quality standards and issues; international strategies for Bus Rapid Transit and general public transportation systems; and fuel efficiency. An additional goal was to commission papers and reports to develop strategies for distribution to NGOs, the media, and other interested parties.

Program: Global Development and Population

Active Projects: 14

DCA Expenses: \$828,019

Niger Family Planning Market Entry Strategy (\$200,000)

Hope Consulting designed a family planning market entry strategy for Niger, based on qualitative and quantitative research and an assessment of the policy environment for family planning service delivery. The Consultant made the full strategy, research findings, and raw data publicly available and disseminated this information actively to the field—with the goal that the Ministry of Health, donors, and service delivery organizations working in Niger could use these insights to design effective and responsive family planning programs.

Program: Performing Arts

Active Projects: 7

DCA Expenses: \$383,864

Capacity-Building Demographic Analysis (\$258,311)

This project provided technical assistance for about sixty Performing Arts grantee organizations by providing capacity-building skills and knowledge. This improved their ability to conduct demographic research about their audiences and participants, and it helped them apply the results of their research to increase their effectiveness.

Program: Philanthropy

Active Projects: 14

DCA Expenses: \$845,720

Hewlett Communications Academy – 2013 (\$251,648)

We provided a three-day communications training program, additional technical assistance, and webinars for approximately 40 participants from Hewlett Foundation grantee organizations across all program areas.

Redstone Work in 2013 (\$190,277)

Redstone established an ongoing effective philanthropy strategy assuming publication of conceptual findings. It performed organizational effectiveness work to help package training curriculum for the broader field and assisted with background literature research. In addition, it documented presentations on best practices in evaluating capacity building, and it supported

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the Environment Program Western Strategy refresh that may serve as a prototype for other refreshes that use outcome-focused grantmaking and publish findings. Finally it prepared a memo of reflections on the Outcome Fund experience. The resulting paper will help philanthropies and practitioners seeking to assist grantees to become more outcome oriented.

Program: Special Projects

Active Projects: 13

DCA Expenses: \$570,413

TIME Summit on Higher Education (\$150,000)

The Summit on the future of higher education was held on September 19 and 20 and was co-sponsored by the Carnegie Corporation and the Hewlett and Gates foundations. The focus was on the American research university, its dual missions of research and teaching, and its importance to U.S. national security and defense; public health; economic prosperity at home and competitiveness abroad; the preservation and transmission of culture; and the creation of knowledgeable, enlightened citizens for the advancement and preservation of a democratic society. The Summit addressed the threats, challenges, and opportunities the research university faces and what it needs to do to retain excellence while making itself more accessible and lowering costs. The Summit ended with panel and breakout sessions on ideas for reinvention to make the university better able meet those challenges and opportunities. The Summit hosted about 150 attendees.