

## REPORT ON 2012 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 2012, Foundation-wide expenses for DCAs totaled \$5,097,730 for seventy-six projects. This is a 33 percent decrease in total dollars since last year and a 7 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: 33**

**DCA Expenses: \$2,461,138**

#### ***Alignment of Common Teacher Observation Protocols with Deeper Learning (\$103,184)***

We engaged the services of SRI International to (1) identify the teacher knowledge, skills, and behaviors required to teach Deeper Learning (DL) skills well; (2) develop a rubric for assessing the alignment of DL instruction with common teacher observation protocols; (3) identify common teacher/classroom observation protocols and collect associated materials, including instructions for use; (4) apply the rubric to protocols; and (5) provide a paper and presentation summarizing its findings and recommended next steps.

#### ***Automated Student Assessment Prize (\$819,048)***

Funding was provided to investigate and develop a prize system to demonstrate the capabilities of automated student assessment systems and induce new breakthroughs, critical to U.S. states in adopting new curricula and new tests to align with Common Core State Standards. The object was to continue the development of the Automated Student Assessment Prize, or ASAP, to include securing results focused on automated essay scoring and to pursue the development and execution of additional prizes, to include one or more competitions focused on automating scoring of short answers, and to disseminate and bring exposure to the results of those competitions.

#### ***Deeper Learning Grantees Convening (\$150,000)***

This funding enabled the Alliance for Excellent Education to coordinate and host the 2012 convening of Hewlett Deeper Learning grantees in Scottsdale, Arizona, to further advance Deeper Learning strategic goals. Hewlett Foundation grantees, experts, and enthusiasts participated.

#### ***Deeper Learning Network Communication Implementation (\$188,022)***

A consultant was hired to provide communications training, media outreach, and general communications support to the Deeper Learning Network, a group of ten model school grantees across the country and to other education stakeholders. Primary attention was paid to the

development of exemplar school site visits within the network to inform policymakers and the education field at large about the impact of deeper learning instruction on student achievement and success. The consultant also supports media outreach for several publications; e.g., Monica Martinez's book on deeper learning and the National Research Council's report on deeper learning effectiveness. The intention is to inform the greater public about the effectiveness of education based on deeper learning principles.

***Policy Framework to Advance Deeper Learning (\$140,000)***

EducationCounsel provided services to assist the Hewlett Foundation's core grantees in field building and other efforts to accelerate deeper learning policy reforms at the federal, national, and state levels by working in an entrepreneurial fashion to advance the then-current work of Hewlett Foundation grantees and to connect grantees with emerging opportunities in the following key areas: supporting common core standards implementation, working with assessment consortia, leveraging next-generation accountability systems, supporting OECD PISA for schools strategy, engaging with Hewlett's proof points network.

**Program: Environment**

**Active Projects: 6**

**DCA Expenses: \$432,529**

***Energy and Climate: Increase Clean Transportation (\$319,468)***

The object of this funding 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 subjects including global air quality standards and issues; international strategies for Bus Rapid Transit and general public transportation systems; and fuel efficiency. Included in the project was the commissioning of papers and reports to develop strategies for distribution to NGOs, the media, and other interested parties.

**Program: Global Development and Population**

**Active Projects: 13**

**DCA Expenses: \$679,169**

***Beyond the Contract: Global NGOs Adapting to a Changing Landscape for Greater Impact and Sustainability (\$225,000)***

FSG, Inc. was funded to research and write a public report to explore the evolving business models and practices of NGOs in the face of a changing external funding landscape. The project also included organizing and convening a collaborative workshop with research participants and stakeholders from the NGO community.

***Legislative Monitoring and Analysis (\$150,943)***

This funding was for legislative monitoring on transparency, government information archives, right-to-know, government expenditure, subnational budget policy, and government accountability to share with grantees and the field.

**Program: Performing Arts****Active Projects: 4****DCA Expenses: \$61,735**

(No projects with expenses greater than \$100,000.)

**Program: Philanthropy****Active Projects: 8****DCA Expenses: \$981,607*****Hewlett Communications Academy (\$226,154)***

Funding for the Hewlett Communications Academy provided a three-day communications training program and additional technical assistance for approximately forty participants from Hewlett Foundation grantee organizations across all program areas.

***Outcomes Fund for Anchor Grantees (\$523,000)***

The Outcomes Fund supports a number of projects that provide outside technical expertise to help grantees (1) incorporate clear goals, monitoring, and evaluation plans with practical metrics of success and (2) integrate guiding principles for decision making into their strategic planning and other activities. By doing so, the Foundation hopes to increase grantees' effectiveness in achieving their ultimate outcomes.

***Ten-Year Vision for the Scaffolding of Social Change (\$113,280)***

Hope Consulting was hired to develop a compelling document that outlines a Ten-Year Vision for the Scaffolding of Social Change, the primary purpose of which is to generate interest in what the future philanthropic ecosystem could look like. At its core, the document is alignment-building that will describe the nonprofit sector's ecosystem as it exists today, paint the vision for a better system tomorrow, and outline the key elements that will be needed to make that vision a reality. The introduction of this material is targeted toward the most influential players in the nonprofit field at first and then will be more widely disseminated.

**Program: Special Projects****Active Projects: 12****DCA Expenses: \$481,552*****Analyzing and Publishing Case Studies of Philanthropic Strategies and Outcome-Driven Grantmaking (\$234,933)***

In close collaboration with the Foundation staff, Redstone Strategy Group uses examples from programs throughout the Foundation to continue developing a model of strategic planning and implementation based on expected return. Redstone has written papers for publication for the field of philanthropy and in collaboration, published findings and case studies on the Foundation's website. The Foundation also pitches appropriate papers to grantmaking journals such as the *Stanford Social Innovation Review*.