

# Report on 2021 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 2021, foundation-wide expenses for DCAs totaled \$2,825,349 for 62 projects. Compared to 2020, this represents a 40% decrease in total dollars spent and an 11% 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: 8****DCA Expenses: \$230,064****Capacity-Building Support for Cyber Initiative Grantees (\$118,875)**

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

**Program: Economy and Society****Active Projects: 4****DCA Expenses: \$124,422****Program: Education****Active Projects: 13****DCA Expenses: \$884,471****2020-2021 Open Educational Resources (OER) Communications Support (\$398,885)**

GMMB will develop a communications plan to promote more effective use by educators of openly licensed content, tools, and services. The consultant will support 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 will focus on three core communications strategies: raising awareness of OER, overcoming perceived obstacles to using OER, and getting users to recommend OER to their peers.

**Field Learning and District Support (\$186,666)**

Partners in School Innovation will support school district grantees to achieve school system transformation. The consultant will create a field facing learning management and support system to track progress and identify problems of practice, as well as help design and facilitate a learning community for all school district partners to meet their diverse learning needs and share knowledge and lessons learned.

**Program: Environment****Active Projects: 8****DCA Expenses: \$245,178**

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**Program: Gender Equity and Governance****Active Projects: 4****DCA Expenses: \$207,000****Program: Performing Arts****Active Projects: 8****DCA Expenses: \$489,794****Research Regarding AB5's Impact on Independent Workers and Employees in California (\$171,710)**

Research will be 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 will be produced and disseminated.

**Financial Technical Assistance for Grantees (\$137,341)**

The consultant, Metis Partner Solutions, will provide a range of financial advisory services to grantees. These services will seek to support grantees as they face financial decisions and navigate challenges that are emerging as a result of the COVID-19 crisis and the accompanying economic situation.

**Program: Effective Philanthropy****Active Projects: 6****DCA Expenses: \$318,827****Center for Effective Philanthropy Grantee Perception Reports (\$164,124)**

The Center for Effective Philanthropy will conduct Grantee Perception Reports for up to eight of Hewlett's intermediary grantee organizations in 2021.

**Program: Special Projects****Active Projects: 8****DCA Expenses: \$212,648****Supporting Social Innovation in CA (\$150,241)**

Freedman Consulting will identify opportunities for supporting social innovation in CA through public-philanthropic partnerships.

**Program: U.S. Democracy****Active Projects: 3****DCA Expenses: \$112,945**

# Report on 2021 Grant Refunds, Transfers, and Cancellations

## GRANT REFUNDS, TRANSFERS, AND CANCELLATIONS

The following list represents grants that were terminated, transferred, or cancelled in 2021 under the authority of the president to take such action. This report provides details for grant changes greater than \$5,000 made in 2021.

	<u>Original Amount</u>	<u>Original Term</u>
<b>Education</b>		
<b>Center for Popular Democracy</b> <i>for support of the Alliance to Reclaim Our Schools</i> (\$355,000 cancelled; project transferred to Schott Foundation for Public Education)	\$710,000	24 months
<b>George Washington University</b> <i>for integrating the National Superintendents Roundtable within George Washington University</i> (\$60,000 cancelled; grantee cancelled work)	\$60,000	12 months
<b>University of Kentucky Research Foundation</b> <i>for support of the National Center for Innovation in Education</i> (\$381,542.11 refunded; project transferred to Tides Center)	\$4,500,000	36 months
<b>University of Washington</b> <i>for development of real-time learning interventions that promote student intrapersonal competencies</i> (\$53,117.63 refunded; grantee underspent)	\$1,000,000	36 months
<b>Environment</b>		
<b>Movement Strategy Center</b> <i>for the Climate Justice Alliance</i> (\$500,000 cancelled; project transferred to the Climate Justice Alliance which became its own entity during the grant period)	\$1,000,000	24 months
<b>Rockefeller Family Fund</b> <i>for the Just Transition Fund</i> (\$300,000 cancelled; project transferred to Rockefeller Philanthropy Advisors)	\$1,000,000	12 months
<b>Gender Equity &amp; Governance</b>		
<b>Fund for the City of New York</b> <i>for the Open Contracting Partnership program</i> (\$660,000 cancelled; transferred to Open Contracting Partnership which became its own entity during the grant period)	\$1,000,000	36 months

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	<u>Original Amount</u>	<u>Original Term</u>
<p><b>King Baudouin Foundation</b>  <i>for support of the Open Algorithms (OPAL) Project</i>            (\$250,000 cancelled; project transferred to Flowminder)</p>	\$500,000	24 months
<b>Performing Arts</b>		
<p><b>Each One Reach One</b>  <i>for the Playwriting Program</i>            (\$25,000 cancelled and transferred to Centers for Equity and Success            which merged with Each One Reach One)</p>	\$50,000	24 months
<b>Special Projects/Political Economy</b>		
<p><b>Barnard College</b>  <i>for CORE Academy dedicated to the reform of economics education            and enrichment of economic discourse</i>            (\$533,810 cancelled; program no longer aligned with foundation's            strategic focus)</p>	\$1,000,000	36 months
<b>U.S. Democracy</b>		
<p><b>National Institute on Money in Politics</b>  <i>for general operating support</i>            (\$250,000 cancelled; merged with Center for Responsive Politics)</p>	\$1,050,000	36 months