

or Section 4947(a)(1) Trust Treated as Private Foundation

Do not enter social security numbers on this form as it may be made public. Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2023, or tax year beginning 01-01-2023, and ending 12-31-2023

Name of foundation: BERTELSMANN FOUNDATION (NA) INC. A Employer identification number: 71-1048702. B Telephone number: (202) 384-1980. C If exemption application is pending, check here. D 1. Foreign organizations, check here. D 2. Foreign organizations meeting the 85% test, check here and attach computation. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$2,265,782. J Accounting method: Accrual.

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), leading to Total revenue of 3,125,034 and Total expenses of 3,013,663, resulting in an excess of 134,803.

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	1,933,000	2,026,421	2,026,421
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	36,115	133,579	133,579
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶ _____ 1,242,204 Less: accumulated depreciation (attach schedule) ▶ _____ 1,136,422	157,174	105,782	105,782
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,126,289	2,265,782	2,265,782	
Liabilities	17	Accounts payable and accrued expenses	141,080	145,770	
	18	Grants payable			
	19	Deferred revenue.			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22).	141,080	145,770	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.				
	24	Net assets without donor restrictions	1,985,209	2,120,012	
	25	Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 26 through 30.				
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
28	Retained earnings, accumulated income, endowment, or other funds				
29	Total net assets or fund balances (see instructions)	1,985,209	2,120,012		
30	Total liabilities and net assets/fund balances (see instructions)	2,126,289	2,265,782		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	1,985,209
2	Enter amount from Part I, line 27a	2	134,803
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,120,012
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	2,120,012

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		3	

Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)		1	0
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0
3 Add lines 1 and 2.		3	0
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.		5	0
6 Credits/Payments:			
a 2023 estimated tax payments and 2022 overpayment credited to 2023	6a		0
b Exempt foreign organizations—tax withheld at source	6b		0
c Tax paid with application for extension of time to file (Form 8868)	6c		0
d Backup withholding erroneously withheld	6d		0
7 Total credits and payments. Add lines 6a through 6d	7		0
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8		0
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	10		
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax Refunded	11		

Part VI-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.
c Did the foundation file Form 1120-POL for this year?
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation. (2) On foundation managers.
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments?
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?
b If "Yes," has it filed a tax return on Form 990-T for this year?
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
By language in the governing instrument, or
By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?
7 Did the foundation have at least \$5,000 in assets at any time during the year?
8a Enter the states to which the foundation reports or with which it is registered (see instructions)
DC
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G?
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023?
If "Yes," complete Part XIII
10 Did any persons become substantial contributors during the tax year?
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)?
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?
Website address

Table with 3 columns: Question ID, Yes, No. Rows 1a-13.

14 The books are in care of FAITH GRAY Telephone no. (202) 384-1980
Located at 1108 16TH STREET NW WASHINGTON DC ZIP+4 20036

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year. 15

16 At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country

Table with 3 columns: Question ID, Yes, No. Rows 16.

Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

- 1a** During the year did the foundation (either directly or indirectly):
 - (1)** Engage in the sale or exchange, or leasing of property with a disqualified person?
 - (2)** Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
 - (3)** Furnish goods, services, or facilities to (or accept them from) a disqualified person?
 - (4)** Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
 - (5)** Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
 - (6)** Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)
- b** If any answer is "Yes" to 1a(1)–(6); did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions
- c** Organizations relying on a current notice regarding disaster assistance check here.
- d** Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2023?
- 2** Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
 - a** At the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?
If "Yes," list the years ► 20___, 20___, 20___, 20___
 - b** Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)
 - c** If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here.
► 20___, 20___, 20___, 20___
- 3a** Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
- b** If "Yes," did it have excess business holdings in 2023 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2023.)
- 4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- b** Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2023?

	Yes	No
1a(1)	Yes	
1a(2)		No
1a(3)		No
1a(4)	Yes	
1a(5)		No
1a(6)		No
1b		No
1d		No
2a		No
2b		
3a		No
3b		
4a		No
4b		No

Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		No
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	5a(4)		No
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		No
b	If any answer is "Yes" to 5a(1)-(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		No
c	Organizations relying on a current notice regarding disaster assistance check <input type="checkbox"/>			
d	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	5d		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	8		No

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LIZ MOHN 1108 16TH STREET NW WASHINGTON, DC 20036	PRESIDENT & DIRECTOR 1.00	0	0	0
JOZEFINA IRENE BRAAM 1108 16TH STREET NW WASHINGTON, DC 20036	DIRECTOR & FIRST VP 35.00	349,120	53,532	0
MARKUS DOHLE 1108 16TH STREET NW WASHINGTON, DC 20036	DIRECTOR 1.00	0	0	0
RALPH HECK 1108 16TH STREET NW WASHINGTON, DC 20036	DIRECTOR 1.00	0	0	0
STEPHEN SZABO 1108 16TH STREET NW WASHINGTON, DC 20036	DIRECTOR 1.00	0	0	0
WILFRIED UHR 1108 16TH STREET NW WASHINGTON, DC 20036	DIRECTOR & SECRETARY/TREASURER 1.00	0	0	0


2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
FAITH GRAY 1108 16TH STREET NW WASHINGTON, DC 20036	DIRECTOR ADMIN 35.00	196,381	53,808	0
ANTHONY SILBERFELD 1108 16TH STREET NW WASHINGTON, DC 20036	TRANSATLANTIC REL DR 35.00	192,080	34,544	0
SAMUEL PUTTER-GEORGE 1108 16TH STREET NW WASHINGTON, DC 20036	GLOBAL/DIGITAL ADVIS 35.00	110,560	25,482	0
COURTNEY FLYNN MARTINO 1108 16TH STREET NW WASHINGTON, DC 20036	SR MANAGER, TRANSATL 35.00	74,310	13,821	0
MEGAN LONG 1108 16TH STREET NW WASHINGTON, DC 20036	PROJECT COORDINATOR 35.00	72,110	14,180	0
Total number of other employees paid over \$50,000.				4

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
SQUIRRO AMERICAS INC 902 BROADWAY NEW YORK, NY 10010	WEB DEVELOPMENT	262,960
CULTIVATE LABS 747 N LASALLE UNIT 220 CHICAGO, IL 60654	WEB DEVELOPMENT	86,719
STICHTING ARE WE EUROPE VEEMKADE 518 HE AMSTERDAM 1018 NL	RESEARCH & DEVELOPMENT	68,578
ANDREW KEEN PRODUCTIONS 1937 CARLETON STREET UNIT C BERKELEY, CA 94704	VIDEO FILMING & PRODUCTION	63,023
THEOHARIS MANAGEMENT 5724 GENERAL WASHINGTON DRIVE ALEXANDRIA, VA 22312	BLDG OPER. EXP. & CONDO INSURANCE	62,520

Total number of others receiving over \$50,000 for professional services. 

Part VIII- Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 ADMINISTRATION - SEE ATTACHED BERTELSMANN FOUNDATION PROJECT SUMMARIES (2023) FOR FURTHER INFORMATION.	1,759,936
2 TRANSATLANTIC RELATIONS - SEE ATTACHED BERTELSMANN FOUNDATION PROJECT SUMMARIES (2023) FOR FURTHER INFORMATION.	1,194,742
3 BFNA GENERAL EVENTS - SEE BERTELSMANN FOUNDATION PROJECT SUMMARIES (2023) FOR FURTHER INFORMATION.	173,087
4	

Part VIII- Summary of Program-Related Investments (see instructions)

	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3 ▶ 0

Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	2,230,239
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,230,239
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d.	3	2,230,239
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	33,454
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	2,196,785
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	109,839

Part X Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part IX, line 6.	1	
2a	Tax on investment income for 2022 from Part V, line 5.	2a	
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	3,013,663
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	3,013,663

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2022:				
a From 2018.				
b From 2019.				
c From 2020.				
d From 2021.				
e From 2022.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ _____				
a Applied to 2022, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2023 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2023. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2019				
b Excess from 2020				
c Excess from 2021.				
d Excess from 2022				
e Excess from 2023				

Part XIII Private Operating Foundations (see instructions and Part VI-A, question 9)

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2023, enter the date of the ruling
- b** Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

- 2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed
- b** 85% (0.85) of line 2a
- c** Qualifying distributions from Part XI, line 4 for each year listed
- d** Amounts included in line 2c not used directly for active conduct of exempt activities
- e** Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

Tax year	Prior 3 years			(e) Total
	(a) 2023	(b) 2022	(c) 2021	
0	0	17,954	5,775	23,729
0	0	15,261	4,909	20,170
3,013,663	3,115,400	2,459,692	2,722,795	11,311,550
0	0	0	0	0
3,013,663	3,115,400	2,459,692	2,722,795	11,311,550
3 Complete 3a, b, or c for the alternative test relied upon:				
a "Assets" alternative test—enter:				
(1) Value of all assets 0				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) 0				
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed				
73,226	70,741	61,861	65,241	271,069
c "Support" alternative test—enter:				
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) 0				
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). 0				
(3) Largest amount of support from an exempt organization 0				
(4) Gross investment income 0				

Part Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

- 1 Information Regarding Foundation Managers:**
 - a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)
 - b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.
- 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

 - a** The name, address, and telephone number or email address of the person to whom applications should be addressed:
 - b** The form in which applications should be submitted and information and materials they should include:
 - c** Any submission deadlines:
 - d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<p>a <i>Paid during the year</i></p> <p>GERMAN MARSHALL FUND OF THE US 1744 R STREET NW WASHINGTON, DC 20009</p>	NONE	P C	GMF CITIES PROJECT	10,000
<p>HARVARD UNIVERSITY 124 MOUNT AUBURN STREET CAMBRIDGE, MA 021385759</p>	NONE	P C	SUPPORT HARVARD'S 2023 EUROPEAN CONFERENCE	10,000
<p>ST ALBAN'S EPISCOPAL CHURCH 3001 WISCONSIN AVENUE NW WASHINGTON, DC 20016</p>	NONE	P C	REHEARSAL FACILITIES FOR NEUE STIMEN CONCERT WITH GERMAN AMBASSADORS	300
<p>Total ▶ 3a</p>				20,300
<p>b <i>Approved for future payment</i></p>				
<p>Total ▶ 3b</p>				0

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

- 1 Program service revenue:
a
b
c
d
e
f
g Fees and contracts from government agencies
2 Membership dues and assessments
3 Interest on savings and temporary cash investments
4 Dividends and interest from securities
5 Net rental income or (loss) from real estate:
a Debt-financed property.
b Not debt-financed property.
6 Net rental income or (loss) from personal property
7 Other investment income
8 Gain or (loss) from sales of assets other than inventory
9 Net income or (loss) from special events:
10 Gross profit or (loss) from sales of inventory
11 Other revenue: a
b
c
d
e
12 Subtotal. Add columns (b), (d), and (e)
13 Total. Add line 12, columns (b), (d), and (e).

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows correspond to items 1-13.

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Table with 2 columns: Line No., Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes.

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B

Schedule of Contributors

OMB No. 1545-0047

(Form 990)
Department of the Treasury
Internal Revenue Service

▶ **Attach to Form 990, 990-EZ, or 990-PF.**
▶ Go to www.irs.gov/Form990 for the latest information.

2023

Name of the organization BERTELSMANN FOUNDATION (NA) INC	Employer identification number 71-1048702
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Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

- 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization

Form 990-PF

- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
BERTELSMANN FOUNDATION (NA) INC

Employer identification number
71-1048702

Part I
Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BERTELSMANN STIFTUNG CARL-BERTELSMANN-STRASSE 256 GUETERSLOH, GUETERSLOH 33311 GM	\$ 3,247,436	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
2	EMBASSY OF THE FEDERAL REPUBLIC OF GERMANY 4645 RESERVOIR RD NW WASHINGTON, DC 20007	\$ 12,400	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization
 BERTELSMANN FOUNDATION (NA) INC

Employer identification number
 71-1048702

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization
BERTELSMANN FOUNDATION (NA) INC

Employer identification number

71-1048702

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	

Additional Data

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Software ID:

Software Version:

TY 2023 IRS 990 e-File Render

Name: BERTELSMANN FOUNDATION (NA) INC

EIN: 71-1048702

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING & AUDITING	31,452	0	0	31,452

TY 2023 IRS 990 e-File Render

Name: BERTELSMANN FOUNDATION (NA) INC

EIN: 71-1048702

Statement:

THE DISTRICT OF COLUMBIA DESIGNATED TAXING AUTHORITY DOES NOT REQUIRE A COPY OF FORM 990-PF TO BE FILED WITH ITS AGENCY.

Name: BERTELSMANN FOUNDATION (NA) INC

EIN: 71-1048702

Identifier	Return Reference	Explanation
DEPRECIATION EXPENSE	FORM 990-PF, PART I, LINE 19	DEPRECIATION STATEMENT:FURNITURE AND EQUIPMENT \$42,421COMPUTER SOFTWARE \$29,520LEASEHOLD IMPROVEMENTS \$34,759 -----DEPRECIATION EXPENSE \$106,700 =====
DIRECT CHARITABLE ACTIVITY	FORM 990-PF, PART VIII-A	<p>BERTELSMANN FOUNDATION PROJECT SUMMARIES & EVENTS (2023)ADMINISTRATION (CC 100)HOW TO FIX DEMOCRACYSINCE ITS ORIGINS, DEMOCRACY HAS BEEN A WORK IN PROGRESS, AND TODAY, MANY QUESTION ITS RESILIENCE. IN RESPONSE, THE BERTELSMANN FOUNDATION TEAMED UP WITH HUMANITY IN ACTION TO LAUNCH A VIDEO AND PODCAST SERIES THAT EXPLORED SOLUTIONS TO THE CHALLENGES DEMOCRACY FACES AROUND THE WORLD. HOST ANDREW KEEN INTERVIEWED PROMINENT ECONOMISTS, POLITICIANS, AUTHORS, ACADEMICS, AND LEADERS AS THE SERIES SOUGHT THE ANSWERS TO HOW TO FIX DEMOCRACY. IN 2023, SEASON FIVE INCLUDED PODCASTS AND VIDEO EPISODES COVERING 100 YEARS OF AMERICAN DEMOCRACY BETWEEN 1924 AND 2024. THE SEASON UNCOVERED THE COMPLEXITIES OF U.S. HISTORY AND ASKED DISTINGUISHED GUESTS WHY IT REMAINS THE MOST ICONIC AND YET MISUNDERSTOOD DEMOCRATIC SYSTEM IN THE WORLD. THE SEASON FEATURED INTERVIEWS WITH ADAM HOCHSCHILD, ROBERT KAGAN, ALIDA BLACK, PAUL SPARROW, AND OTHERS.LEADERSHIP IN ACTIONTHE BERTELSMANN FOUNDATION PARTNERED WITH THE ASPEN MINISTERS FORUM TO CREATE THE THIRD SEASON OF OUR JOINT ANIMATED VIDEO SERIES CALLED LEADERSHIP IN ACTION, WHICH LEVERAGES THE EXPERIENCE OF FORMER GOVERNMENT OFFICIALS DURING TIMES OF CRISIS. SEASON THREE INCLUDED TZIPI LIVNI DISCUSSING THE ISRAELI-PALESTINIAN PEACE NEGOTIATIONS, UGANDAN OPPOSITION LEADER BOBI WINE ON THE FUTURE OF DEMOCRACY IN HIS COUNTRY, AND JAN ELIASSON RECOUNTING INCIDENTS OF RESOLVING CONFLICTS AROUND THE GLOBE. EACH EPISODE IS ACCOMPANIED BY AN EDUCATION GUIDE DESIGNED FOR STUDENTS AND TEACHERS FROM THE SECONDARY SCHOOL LEVEL THROUGH HIGHER EDUCATION TO ENGAGE WITH AND BENEFIT FROM THIS CONTENT.THIS PROJECT ALSO ACCOMPANIED THE BERTELSMANN FOUNDATION'S PARTICIPATION IN THE ANNUAL ASPEN MINISTERS FORUM MEETING. IN 2023, THIS MEETING TOOK PLACE IN COPENHAGEN AND GATHERED 25 FOREIGN MINISTERS REPRESENTING EVERY CONTINENT ON EARTH TO DISCUSS THE HOT SPOT IN GLOBAL AFFAIRS FOR THE YEAR AHEAD. NEUE STIMMENTHE BERTELSMANN FOUNDATION AND THE GERMAN EMBASSY HOSTED THEIR ANNUAL NEUE STIMMEN CONCERT AND DINNER EVENT. THIS GATHERING BROUGHT TOGETHER KEY FIGURES FROM GERMAN-AMERICAN CULTURAL, POLITICAL AND BUSINESS NETWORKS FOR AN EVENING OF MUSIC AND CONVERSATION. THE CENTERPIECE OF THIS EVENT FEATURED FOUR OPERA SINGERS FROM THE NEUE STIMMEN INTERNATIONAL COMPETITION.NEUE STIMMEN CONCERT & DINNER, GERMAN AMBASSADOR'S RESIDENCE, WASHINGTON, DC (DECEMBER 4, 2023): THE BERTELSMANN FOUNDATION AND THE GERMAN EMBASSY HOSTED THEIR ANNUAL NEUE STIMMEN CONCERT AND DINNER EVENT ON DECEMBER 4. THE GATHERING BROUGHT TOGETHER KEY FIGURES FROM THE GERMAN-AMERICAN CULTURAL, POLITICAL, AND BUSINESS NETWORK FOR AN EVENING OF MUSIC AND CONVERSATION. THE CENTERPIECE OF THIS EVENT FEATURED OPERA SINGERS FROM THE NEUE STIMMEN INTERNATIONAL COMPETITION.VIDEOS/NO COLLAR ECONOMYIN 2023, THE BERTELSMANN FOUNDATION CONTINUED ITS WORK IN THE DOCUMENTARY FILM, ANIMATION, AND WRITTEN CONTENT SPHERE WITH A SPECIFIC FOCUS ON ECONOMIC, POLITICAL, SOCIAL AND DIGITAL ISSUES. SPECIFICALLY, THE BERTELSMANN FOUNDATION PRODUCED THE DOCUMENTARY FILM TINDERBOX, BELT & ROAD: CHINA IN THE BALKANS, A FILM THAT FOCUSES ON THE IMPACT OF CHINESE INVESTMENT IN SERBIA AND MONTENEGRO. AFTER COMPLETING THE FILM, THE BERTELSMANN FOUNDATION ORGANIZED A SERIES OF SCREENING EVENTS AT UNIVERSITIES AND ORGANIZATIONS IN THE U.S. AND EUROPE, INCLUDING A SERIES OF SCREENINGS HOSTED BY THE U.S. DEPARTMENT OF STATE AT THE FOREIGN SERVICE INSTITUTE. ADDITIONALLY, AS PART OF THE NO COLLAR ECONOMY PROJECT, THE BERTELSMANN FOUNDATION COMPOSED THE LONG FORM STUDY HOTSPOTS: THE INTERNET AND COLLECTIVE ACTION IN AUTHORITARIAN SETTINGS. THIS STUDY INVESTIGATED HOW ACCESS TO DIGITAL TOOLS HAS IMPACTED CIVIL SOCIETY IN COUNTRIES UNDER AUTHORITARIAN CONTROL. PRIOR TO RELEASING THE PAPER, BFNA HOSTED A ROUNDTABLE EXPERT DISCUSSION TO PRESENT THE FINDINGS. ADDITIONAL PROJECT WORK INCLUDED A NEW SEASON OF TALKING TRANSATLANTIC AFFAIRS, IN WHICH BFNA INTERVIEWED A SERIES OF YOUNG EUROPEAN LEADERS ON CRITICAL ASPECTS OF THE TRANSATLANTIC RELATIONSHIP. IN COLLABORATION WITH BFNA'S DEMOCRRACTIC RESEARCH & INNOVATION LAB PROJECT, THE NO COLLAR ECONOMY PROJECT HELPED TO PRODUCE THE BERTELSMANN FOUNDATION DOCUMENTARY AGORA, WHICH FOCUSED ON THE AFTERMATH OF THE GREEK FINANCIAL CRISES IN ATHENS. AS PART OF THE PROJECT, THE BERTELSMANN FOUNDATION BEGAN FILMING ON A NEW DOCUMENTARY THAT FOCUSES ON THE IMPORTANCE OF RAW MATERIALS IN THE LITHIUM BATTERY. THIS DOCUMENT WILL BE RELEASED IN 2024. FINALLY, THE INITIATIVE ALSO FOCUSED ON OUTREACH FOR ITS CONTENT, HOLDING OVER 50 SCREENING EVENTS WITH SCHOOLS, UNIVERSITIES, THINK-TANKS, NON-PROFIT ORGANIZATIONS, LOCAL GROUPS AND FILM FESTIVALS. THESE SCREENING EVENTS WERE ALWAYS FOLLOWED BY PANEL DISCUSSIONS FEATURING EXPERTS AND WELL AS COMMUNITY STAKEHOLDERS. SCREENING OF BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON, DC, ARCHITECTURE & DESIGN FILM FESTIVAL, WASHINGTON, DC (JANUARY 29, 2023): THE ARCHITECTURE & DESIGN FILM FESTIVAL SCREENED THE BERTELSMANN FOUNDATION "BARRY FARM" AT THE NATIONAL BUDLING MUSEUM IN WASHINGTON, DC. AFTER THE FILM, BERTELSMANN FOUNDATION GLOBAL MARKETS AND DIGITAL ADVISOR SAMUEL GEORGE MODERATED A PANEL THAT ALSO FEATURED THE FILM'S CO-DIRECTOR, SABIYHA PRINCE, FORMER BARRY FARM RESIDENT COLEMAN HALL, AND HISTORIAN AND PRESERVATIONIST DR. GRETA FULLER. THE EVENT EVIDENCED THE BERTELSMANN FOUNDATION'S IMPACT ON GENERATING INCLUSIVE AND DIVERSE CONVERSATIONS AROUND INTERESTS OF TRANS-ATLANTIC INTEREST, IN THIS CASE, HOUSING RIGHTS AND CIVIL RIGHTS. SCREENING OF BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON, DC, DC PRESERVATION LEAGUE, WASHINGTON, DC (JANUARY 29, 2023): THE DC PRESERVATION LEAGUE SCREENED THE BERTELSMANN FOUNDATION DOCUMENTARY "BARRY FARM" AT THE OCTAGON MUSEUM IN WASHINGTON, DC. AFTER THE FILM,</p>

Identifier	Return Reference	Explanation
		<p>BERTELSMANN FOUNDATION GLOBAL MARKETS AND DIGITAL ADVISOR SAMUEL GEORGE JOINED A PANEL THAT ALSO FEATURED THE FILM'S CO-DIRECTOR, SABIYHA PRINCE, AND HISTORIAN SARAH SCHOENFELD. THE EVENT EVIDENCED BERTELSMANN FOUNDATION'S IMPACT ON GENERATING INCLUSIVE AND DIVERSE CONVERSATIONS AROUND INTERESTS OF TRANS-ATLANTIC INTEREST, IN THIS CASE, HOUSING RIGHTS AND CIVIL RIGHTS. SCREENING OF GO-GO CITY: DISPLACEMENT & PROTEST IN WASHINGTON, NATIONAL COMMUNITY REINVESTMENT COALITION, WASHINGTON, DC (FEBRUARY 2, 2023): THE NATIONAL COMMUNITY REINVESTMENT COALITION (NCRC) HOSTED A SCREENING OF THE BERTELSMANN FOUNDATION DOCUMENTARY "GO-GO CITY: DISPLACEMENT & PROTEST IN WASHINGTON, DC". THE SCREENING WAS PART NCRC'S "JUST ECONOMY" SERIES OF CONTENT. FOLLOWING THE FILM, IBIJOKE AKINBOWALE, NCRC'S DIRECTOR OF COMMUNITY IMPACT, LED A CONVERSATION WITH THE BERTELSMANN FOUNDATION'S SAMUEL GEORGE. THE CONVERSATION ALSO FEATURED EXTENSIVE INPUT AND QUESTION AND ANSWERS WITH THE AUDIENCE. THE EVENT DEMONSTRATED THE FOUNDATION'S IMPACT IN APPLYING ITS INTERNATIONAL AREAS OF INTEREST SUCH AS GOOD GOVERNANCE AND ECONOMIC INCLUSION TO THE LOCAL SETTING. THE EVENT ALSO DEMONSTRATED THE FOUNDATION'S ABILITY TO USE MULTI-MEDIA OUTPUTS TO GENERATE AN INCLUSIVE CONVERSATION AND TO BRING DIFFERENT STAKEHOLDERS TO THE TABLE. SCREENING OF BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON, DC, DC PUBLIC LIBRARY'S MT. PLEASANT BRANCH, WASHINGTON, DC (FEBRUARY 4, 2023): THE DC PUBLIC LIBRARY'S MT. PLEASANT BRANCH HOSTED A SCREENING OF THE BERTELSMANN FOUNDATION AND DC LEGACY PROJECT DOCUMENTARY "BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON, DC". THE EVENT WAS PART OF AN ONGOING COLLABORATION BETWEEN THE BERTELSMANN FOUNDATION AND THE DC LIBRARY USING BERTELSMANN FOUNDATION DOCUMENTARIES TO SPUR CONVERSATION. FOLLOWING THE FILM, THE FILM'S DIRECTORS, SABIYHA PRINCE AND BERTELSMANN FOUNDATION'S SAMUEL GEORGE, PARTICIPATED IN A MODERATED CONVERSATION ON THE FILM, THAT ALSO FEATURED QUESTIONS FROM THE AUDIENCE. THE EVENT DEMONSTRATED THE FOUNDATION'S ABILITY TO USE MULTI-MEDIA OUTPUTS TO GENERATE AN INCLUSIVE AND DIVERSE CONVERSATION AND TO BRING DIFFERENT STAKEHOLDERS TO THE TABLE. VIRTUAL SCREENING OF BARRY FARM: COMMUNITY, LAND AND JUSTICE IN LAW FIRM OF MILLER & CHEVALIAR (FEBRUARY 17, 2023): THE BERTELSMANN FOUNDATION PRESENTED ITS DOCUMENTARY FILM "BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON DC" IN AN ONLINE EVENT FOR LAWYERS AT THE LAW FIRM MILLER & CHEVALIAR. FOLLOWING THE FILM, THE FILM'S DIRECTORS SABIYHA PRINCE AND BERTELSMANN FOUNDATION'S SAMUEL GEORGE ANSWERED QUESTIONS FROM THE ONLINE AUDIENCE. THE EVENT DEMONSTRATED BERTELSMANN FOUNDATION'S ABILITY TO USE MULTI-MEDIA OUTPUTS TO INFLUENCE THE POLICY LEADERS, IN THIS CASE, IN THE FIELD OF LAW. SCREENING OF BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON, DC, AMERICAN UNIVERSITY, WASHINGTON, DC (FEBRUARY 23, 2023): THE BERTELSMANN FOUNDATION PRESENTED ITS DOCUMENTARY FILM "BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON DC" AT AMERICAN UNIVERSITY AT THE INVITATION OF THE SCHOOL OF PUBLIC AFFAIRS. FOLLOWING THE FILM, THE FILM'S DIRECTORS SABIYHA PRINCE AND BERTELSMANN FOUNDATION'S SAMUEL GEORGE JOINED A PANEL CONVERSATION THAT ALSO FEATURED SAN JOSE STATE UNIVERSITY PROFESSOR MICHAEL FISHER. THE PANEL WAS MODERATED BY AMERICAN UNIVERSITY PROFESSOR DEREK HYRA. THE EVENT DEMONSTRATED BERTELSMANN FOUNDATION'S ABILITY TO USE MULTI-MEDIA OUTPUTS TO INTEGRATE INTO THE HIGHEST LEVELS OF AMERICAN ACADEMIA. SCREENING OF BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON, DC, OFFICE OF THE ATTORNEY GENERAL FOR THE DISTRICT OF COLUMBIA, WASHINGTON, DC (FEBRUARY 28, 2023): THE BERTELSMANN FOUNDATION PRESENTED ITS DOCUMENTARY FILM "BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON DC" FOR EMPLOYEES OF THE OFFICE OF THE ATTORNEY GENERAL FOR THE DISTRICT OF</p>
DIRECT CHARITABLE ACTIVITY (CONTINUED)	FORM 990-PF, PART VIII-A	<p>BFNA DIGITAL PLATFORMS PRESENTATION, EUROPEAN STUDENT CONFERENCE, YALE UNIVERSITY, NEW HAVEN, CT (APRIL 15-16, 2023): COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS, AND DANIELA ROJAS MEDINA, RESEARCH ANALYST, REPRESENTED THE BERTELSMANN FOUNDATION AT THE 2023 EUROPEAN STUDENT CONFERENCE, ORGANIZED BY THE EUROPEAN HORIZONS TRANSATLANTIC STUDENT ORGANIZATION. THE CONFERENCE WAS ATTENDED BY 80 UNDERGRADUATE AND GRADUATE STUDENTS FROM THE UNITED STATES AND EUROPE, AND WAS HELD AT YALE UNIVERSITY IN NEW HAVEN, CT. ON APRIL 16, THE BERTELSMANN FOUNDATION PARTICIPATED IN A PARTNER LUNCH, WHERE STAFF PRESENTED AN OVERVIEW OF THE FOUNDATION'S MISSION AND PROJECTS, HIGHLIGHTING THE TRANSATLANTIC BAROMETER, RANGE, AND THE TRANSATLANTIC PERISCOPE. DEMONSTRATIONS OF THE THREE DIGITAL PLATFORMS FOCUSED ON THEIR USEFULNESS AS STUDENT RESEARCH TOOLS AND PLATFORMS OF ENGAGEMENT. THROUGHOUT THE CONFERENCE, BFNA STAFF HAD THE OPPORTUNITY TO ATTEND SESSIONS TO NETWORK WITH STUDENTS AND OTHER PARTNER ORGANIZATIONS. UNITED STATES, AUSTRIA AND THE FUTURE OF THE TRANSATLANTIC ECONOMY, EMBASSY OF AUSTRIA, WASHINGTON, DC (APRIL 17, 2023): THE BERTELSMANN FOUNDATION AND THE EMBASSY OF AUSTRIA CO-HOSTED A BREAKFAST ROUNDTABLE EXPLORING THE CURRENT STATE OF THE TRANSATLANTIC ECONOMY, AND ITS PROSPECTS FOR THE FUTURE. THE EVENT KICKED OFF WITH WELCOME REMARKS FROM THE NEW AUSTRIAN AMBASSADOR TO THE UNITED STATES, PETRA SCHNEEBAUER, FOLLOWED BY A PANEL DISCUSSION AMONG THE BERTELSMANN FOUNDATION'S EXECUTIVE DIRECTOR IRENE BRAAM, JOHNS HOPKINS UNIVERSITY PROFESSOR DAN HAMILTON AND THE AUSTRIAN MARSHALL PLAN FOUNDATION PRESIDENT WOLFGANG PETRITSCH. PROFESSOR HAMILTON SET THE SCENE FOR THE CONVERSATION BY PROVIDING A BRIEFING FROM HIS ANNUAL REPORT ON THE TRANSATLANTIC ECONOMY. THIS LED THE ROUNDTABLE INTO A DISCUSSION, MODERATED BY THE ATLANTIC COUNCIL'S FRAN BURWELL, ON A RANGE OF TOPICS INCLUDING TRADE BETWEEN THE EU AND ITS PARTNERS AROUND THE GLOBE, PRIVACY REGIMES IN THE U.S. AND EUROPE, AND THE FUTURE OF REGULATING ARTIFICIAL INTELLIGENCE. THE ROUNDTABLE WAS ATTENDED BY DIPLOMATS, CONGRESSIONAL STAFFERS, ADMINISTRATION OFFICIALS AND THINK TANK REPRESENTATIVES. BFNA DIGITAL PLATFORMS PRESENTATION, UNIVERSITY OF CALIFORNIA, BERKELEY, BERKELEY, CA (APRIL 19, 2023): COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS, SARA LEMING, RESEARCH ANALYST, AND DANIELA ROJAS MEDINA, RESEARCH ANALYST, PRESENTED THE BERTELSMANN FOUNDATION'S DIGITAL PLATFORMS TO 20 UNDERGRADUATE STUDENTS AT THE UNIVERSITY CALIFORNIA, BERKELEY'S INSTITUTE OF EUROPEAN STUDIES. THE PRESENTATION BEGAN WITH AN OVERVIEW OF THE BERTELSMANN FOUNDATION'S WORK, HIGHLIGHTING MULTIMEDIA PROJECTS INCLUDING LEADERSHIP IN ACTION, HOW TO FIX DEMOCRACY, AND BFNA DOCS. STUDENTS SHOWED GREAT</p>

Identifier	Return Reference	Explanation
		<p>INTEREST IN THE FOUNDATION'S MISSION AND PROJECTS, PARTICULARLY HOW THE BERTELSMANN FOUNDATION OPERATES AS A "NON-TRADITIONAL" THINK TANK IN WASHINGTON, D.C. THE PRESENTATION CLOSED WITH AN OVERVIEW OF THE TRANSATLANTIC BAROMETER, TRANSATLANTIC PERISCOPE, AND RANGE, SHOWCASING THEIR USEFULNESS AS STUDENT RESEARCH TOOLS AND PLATFORMS OF ENGAGEMENT. SEVERAL STUDENTS SCHEDULED CONVERSATIONS TO LEARN MORE ABOUT INDIVIDUAL PROJECTS AND STUDENT OPPORTUNITIES, SUCH AS INTERNSHIPS AND THE SUMMER ENRICHMENT SERIES.</p> <p>BFNA DIGITAL PLATFORMS PRESENTATION, CONSULATE GENERAL OF IRELAND, SAN FRANCISCO, CA (APRIL 19, 2023): COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS, SARA LEMING, RESEARCH ANALYST, AND DANIELA ROJAS MEDINA, RESEARCH ANALYST, PRESENTED THE BERTELSMANN FOUNDATION'S DIGITAL PLATFORMS TO STAFF AT THE CONSULATE GENERAL OF IRELAND IN SAN FRANCISCO, CA, INCLUDING CONSUL GENERAL MICHEL SMITH, VICE CONSUL JENNIFER CHADWICK, AND EVENTS AND COMMUNICATIONS OFFICER NIC O'LOUGHLIN. THE PRESENTATION FOCUSED ON THE USEFULNESS OF THE TRANSATLANTIC BAROMETER, RANGE, AND TRANSATLANTIC PERISCOPE FOR THE DIPLOMATIC COMMUNITY AS A MEANS TO OBTAIN RELIABLE, CREDIBLE INFORMATION ON TRANSATLANTIC POLICY AND THE U.S.-IRELAND RELATIONSHIP. THERE WAS GREAT INTEREST IN UTILIZING THE PLATFORMS TO FURTHER THE IRISH CONSULATE'S PUBLIC AND CULTURAL DIPLOMACY AIMS, SUCH AS EVENTS HIGHLIGHTING IRELAND'S POLICY POSITIONS ON THE PLATFORMS AROUND SPECIFIC TOPICS THAT ALIGN WITH THE CONSULATE'S STRATEGIC PRIORITIES, MOST NOTABLY TRADE AND FOREIGN DIRECT INVESTMENT.</p> <p>BFNA DIGITAL PLATFORMS PRESENTATION, EUROPEAN UNION OFFICE, SAN FRANCISCO, CA (APRIL 20, 2023): COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS, SARA LEMING, RESEARCH ANALYST, AND DANIELA ROJAS MEDINA, RESEARCH ANALYST, PRESENTED THE BERTELSMANN FOUNDATION'S DIGITAL PLATFORMS TO STAFF AT THE EU OFFICE IN SAN FRANCISCO, INCLUDING: HEAD OF OFFICE GERARD DE GRAAF, DEPUTY HEAD OF OFFICE JOANNA SMOLINSKA, AND TECHNOLOGY POLICY TRAINEE GIULIA GENELETTI. THE PRESENTATION FOCUSED ON THE USEFULNESS OF THE TRANSATLANTIC BAROMETER, RANGE, AND TRANSATLANTIC PERISCOPE FOR THE DIPLOMATIC COMMUNITY AS A MEANS TO OBTAIN RELIABLE, CREDIBLE INFORMATION ON TRANSATLANTIC POLICY. THE EU OFFICE, WHICH FOCUSES PRIMARILY ON DIGITAL POLICY AND TECHNOLOGY, WAS INTERESTED IN PARTNERING WITH THE BERTELSMANN FOUNDATION TO HOST EVENTS THAT SHOWCASED THE PLATFORMS' DIGITAL POLICY TOPICS FROM AN EU PERSPECTIVE, SUCH AS DIGITAL INFRASTRUCTURE, BROADBAND CONNECTIVITY, ARTIFICIAL INTELLIGENCE, AND CHAT AI.</p> <p>BFNA DIGITAL PLATFORMS PRESENTATION, CLAREMONT COLLEGES, CLAREMONT, CA (APRIL 24, 2023): COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS, SARA LEMING, RESEARCH ANALYST, AND DANIELA ROJAS MEDINA, RESEARCH ANALYST, PRESENTED THE BERTELSMANN FOUNDATION'S DIGITAL PLATFORMS TO 15 UNDERGRADUATE STUDENTS FROM THE CLAREMONT COLLEGES SYSTEM, INCLUDING STUDENTS FROM SCRIPPS COLLEGE, POMONA COLLEGE, CLAREMONT MCKENNA COLLEGE, AND PITZER COLLEGE. THE EVENT WAS HOSTED AT SCRIPPS COLLEGE. THE PRESENTATION BEGAN WITH AN OVERVIEW OF THE BERTELSMANN FOUNDATION'S WORK, HIGHLIGHTING MULTIMEDIA PROJECTS INCLUDING LEADERSHIP IN ACTION, HOW TO FIX DEMOCRACY, AND BFNA DOCS. STUDENTS SHOWED GREAT INTEREST IN THE FOUNDATION'S MISSION AND PROJECTS, PARTICULARLY HOW THE BERTELSMANN FOUNDATION OPERATES AS A "NON-TRADITIONAL" THINK TANK IN WASHINGTON, D.C. THE PRESENTATION CLOSED WITH AN OVERVIEW OF THE TRANSATLANTIC BAROMETER, TRANSATLANTIC PERISCOPE, AND RANGE, SHOWCASING THEIR USEFULNESS AS STUDENT RESEARCH TOOLS AND PLATFORMS OF ENGAGEMENT. SEVERAL STUDENTS SCHEDULED CONVERSATIONS TO LEARN MORE ABOUT INDIVIDUAL PROJECTS AND STUDENT OPPORTUNITIES, SUCH AS INTERNSHIPS AND THE SUMMER ENRICHMENT SERIES.</p> <p>TRANSATLANTIC YOUTH SUMMIT RECEPTION, BERTELSMANN FOUNDATION, WASHINGTON, DC (APRIL 27, 2023): THE BERTELSMANN FOUNDATION HOSTED THE FELLOWS OF THE TRANSATLANTIC YOUTH SUMMIT. THE TRANSATLANTIC YOUTH SUMMIT, UNDER THE LEADERSHIP OF MEP LIDIA PEREIRA, IS PART OF THE EU'S EFFORTS TO STRENGTHEN STRATEGIC RELATIONS WITH THE US, BRINGING TOGETHER YOUNG EUROPEAN AND AMERICAN ACADEMICS, POLICYMAKERS, AND ENTREPRENEURS. U.S. HOUSE REPRESENTATIVE JIM COSTA AND RIA OOMEN-RUIJTEN, PRESIDENT OF THE ROBERT SCHUMAN FOUNDATION, GAVE WELCOME REMARKS FOR THE EVENT.</p> <p>DEMOCRACYNEXT ROUNDTABLE: EMPOWERED CITIZENS' ASSEMBLIES, BERTELSMANN FOUNDATION, WASHINGTON, DC (MAY 2 2023): THE BERTELSMANN FOUNDATION, IN COLLABORATION WITH DEMOCRACYNEXT, HOSTED A ROUNDTABLE TO DISCUSS THE INCREASING INTERNATIONAL TRENDS OF INSTITUTIONALIZED CITIZENS' ASSEMBLIES. PARTICIPANTS DISCUSSED WHETHER CITIZENS' ASSEMBLIES CAN BE A RESPONSE TO A BROAD SENSE OF DEMOCRATIC CRISIS, LOW LEVELS OF TRUST BETWEEN GOVERNMENT AND CITIZENS, INCREASING POLARIZATION, AND DIFFICULTY TAKING POLITICAL DECISIONS ON CERTAIN SALIENT POLICY ISSUES. PARTICIPANTS FURTHER DISCUSSED THE POTENTIAL OF CITIZENS' ASSEMBLIES IN THE UNITED STATES AND MAKING THEM A PERMANENT PART OF THE BROADER DEMOCRATIC ARCHITECTURE. PARTICIPANTS INCLUDED REPRESENTATIVES OF PROMINENT FOUNDATIONS ACROSS THE U.S. INCLUDING THE OBAMA FOUNDATION, ROCKEFELLER FOUNDATION, AND SCHMIDT FUTURES.</p> <p>DEMOCRACY CAF, WASHINGTON, DC & NEW YORK, NY (JUNE 1 & 5, 2023): THE BERTELSMANN FOUNDATION PARTNERED WITH THE UK-BASED ORGANIZATION MY LIFE MY SAY AND THE AMERICAN UNIVERSITY'S SINE INSTITUTE OF POLICY & POLITICS TO HOST A DEMOCRACY CAF IN WASHINGTON, DC, ON JUNE 1 AND NEW YORK CITY ON JUNE 5. A VERY DIVERSE GROUP OF YOUNG ACTIVISTS FROM BOTH CITIES JOINED THE DISCUSSIONS ON THE MOST URGENT CHALLENGES TO DEMOCRACY. PIONEERED BY MY LIFE MY SAY IN COMMUNITIES THROUGHOUT THE UNITED KINGDOM, DEMOCRACY CAF IS AN ATTEMPT TO REINVIGORATE 17TH CENTURY CAFE CULTURE WHERE MEMBERS OF SOCIETY COULD MEET AND DISCUSS LOCAL ISSUES. THE CAFES BRING TOGETHER A SMALL GROUP OF PEOPLE FROM ACROSS THE POLITICAL SPECTRUM TO VOTE ON THREE BIG ISSUES THEY BELIEVE THE COMMUNITY/COUNTRY IS FACING, THEN PARTICIPATE IN A FACILITATED DISCUSSION ABOUT THEIR OPINION ON THESE ISSUES. METE COBAN, MY LIFE MY SAY FOUNDER & CEO, FACILITATED BOTH DISCUSSIONS. IN WASHINGTON, DC, THE EVENT WAS HELD AT THE BERTELSMANN FOUNDATION AND INCLUDED 20 PARTICIPANTS FROM CIVIL SOCIETY, DEMOCRACY ORGANIZATIONS AND ACADEMIA. IN NEW YORK CITY, THE EVENT WAS HELD AT BETAWORKS STUDIOS AND INCLUDED 15 PARTICIPANTS FROM LOCAL GRASSROOTS ACTIVIST GROUPS.</p> <p>TRANSATLANTIC POLICY NETWORK'S CYBERSECURITY AND RESILIENCE: CONNECTING THE REGULATORY AND TECHNICAL AGENDAS, RAYBURN HOUSE OFFICE BUILDING, WASHINGTON, DC (JULY 26, 2023): EXECUTIVE DIRECTOR IRENE BRAAM, TOGETHER WITH MEMBERS OF THE EUROPEAN PARLIAMENT, U.S. CONGRESS AND REPRESENTATIVES FROM THE PRIVATE SECTOR, PARTICIPATED</p>

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		IN A PANEL DISCUSSION ON TRANSATLANTIC COLLABORATION IN THE AREA OF CYBERSECURITY. THE PANEL WAS PART OF THE TRANSATLANTIC POLICY NETWORK'S TRANSATLANTIC WEEK, WHICH BROUGHT TOGETHER EU LEGISLATORS WITH U.S. MEMBERS OF CONGRESS TO DISCUSS THE GLOBAL CHALLENGES FACING THE TRANSATLANTIC RELATIONS.&N
DIRECT CHARITABLE ACTIVITY (CONTINUED)	FORM 990-PF, PART VIII-A	<p>U.S. GERMAN EMBASSY TOWNHALLS, MILWAUKEE, WI (JUNE 12-13, 2023): IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO MILWAUKEE AND MADISON, WISCONSIN WITH MR. AXEL DITTMANN, DEPUTY AMBASSADOR OF GERMANY TO THE UNITED STATES. THE PURPOSE OF THE TRIP WAS TO ENHANCE MR. DITTMANN'S UNDERSTANDING OF THE STATE OF DEMOCRACY IN WISCONSIN AND THE ECONOMIC PARTNERSHIP BETWEEN THE MIDWESTERN STATE AND GERMANY. TOGETHER THE GROUP VISITED A VARIETY OF NGOS SUCH AS THE WISCONSIN DEMOCRACY CAMPAIGN, LEAGUE OF WOMEN VOTERS, AND SOULS TO THE POLLS. THE GROUP ALSO MET WITH ELECTED OFFICIALS SUCH AS REPUBLICAN AND DEMOCRAT STATE SENATORS AND MR. CAVALIER JOHNSON, MAYOR OF MILWAUKEE. OVERALL THE TRIP PROVIDED A WELL-ROUNDED PERSPECTIVE ON THE UPCOMING 2024 PRESIDENTIAL ELECTION AND THE CURRENT POLITICAL POLARIZATION WITHIN THE STATE. HARIBO ALSO HOSTED THE GROUP FOR A PRIVATE TOUR OF ITS NEWEST FACILITY IN PLEASANT PRAIRIE. THE TRIP ALLOWED BFNA TO CREATE NEW CONNECTIONS AND MAINTAIN EXISTING ONES IN WISCONSIN.</p> <p>U.S. GERMAN EMBASSY TOWNHALLS, OKLAHOMA CITY, OK (SEPTEMBER 25-26, 2023): BFNA'S IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO OKLAHOMA CITY WITH MR. MARKUS TEGLAS, POLITICAL AFFAIRS COUNSELOR AT THE GERMAN EMBASSY IN WASHINGTON DC. THE PURPOSE OF THE TRIP WAS TO ENHANCE MR. TEGLAS' UNDERSTANDING OF THE STATE OF DEMOCRACY IN OKLAHOMA. THE TOWN HALL KICKED OFF WITH A VISIT TO CHICKASAW NATION IN ADA, OKLAHOMA. THE GROUP MET WITH TRIBE LEADERSHIP AND DISCUSSED THE HISTORY OF THE CHICKASAW PEOPLE AND THEIR CURRENT ECONOMIC INVOLVEMENT IN THE STATE OF OKLAHOMA. NEXT THE GROUP PARTICIPATED IN AN EVENT "A TALK WITH MARKUS TEGLAS" WHICH WAS ATTENDED BY 35 PEOPLE AT THE UNIVERSITY OF OKLAHOMA IN NORMON. THE FOLLOWING DAY THE GROUP MET WITH A VARIETY OF NGOS SUCH AS ROCK THE NATIVE VOTE, LETS FIX THIS, UNITED OKLAHOMA, FREEDOM CENTER, AND THE YMCA YOUTH IN GOVERNMENT PROGRAM. THE GROUP ALSO MET WITH ELECTED OFFICIALS SUCH AS REPUBLICAN AND DEMOCRAT STATE LEADERS AND MR. DAVID HOLT, MAYOR OF OKLAHOMA CITY. OVERALL, THE TRIP PROVIDED A WELL-ROUNDED PERSPECTIVE ON THE STATE OF POLITICAL AND ECONOMIC AFFAIRS IN OKLAHOMA AND ITS CAPITAL CITY. THE TRIP ALLOWED BFNA TO CREATE NEW CONNECTIONS AND MAINTAIN EXISTING ONES IN OKLAHOMA.</p> <p>U.S. GERMAN EMBASSY TOWNHALLS, MONTANA (NOVEMBER 1-3, 2023): IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO THE CITIES OF BOZEMAN, HELENA, AND MISSOULA, MONTANA WITH MR. RAINER BREUL, HEAD OF THE POLITICAL AFFAIRS SECTION AT THE GERMAN EMBASSY IN WASHINGTON DC. THE TRIP INTENDED TO ENHANCE MR. BREUL'S UNDERSTANDING OF THE STATE OF POLITICAL AFFAIRS IN MONTANA. THE TOWN HALL KICKED OFF WITH A VISIT TO THE GRASSROOT GROUPS, FORWARD MONTANA AND THE LEAGUE OF WOMEN VOTERS, TO DISCUSS VOTING RIGHTS IN THE STATE. THE GROUP THEN MET WITH DEMOCRATIC AND REPUBLICAN LEADERSHIP IN THE BOZEMAN AREA. NEXT THE GROUP PARTICIPATED IN A VARIETY OF MEETINGS IN HELENA INCLUDING MEETINGS WITH POLITICAL AND ENVIRONMENTAL EXPERTS AND THE MAYOR OF HELENA, MR. WILMONT COLLINS. THE FOLLOWING DAY THE GROUP ARRIVED IN MISSOULA AND MET WITH ADDITIONAL STATE REPRESENTATIVES FROM BOTH SIDES OF THE AISLE, THE MONTANA WORLD AFFAIRS COUNCIL AND THE CITY COUNCIL PRESIDENT, MS. GWEN JONES. THE TRIP ALLOWED BFNA TO CREATE NEW CONNECTIONS AND LEARN ABOUT THE ONGOING CHALLENGES IN MONTANA.</p> <p>U.S. GERMAN EMBASSY TOWNHALLS, DEEP SOUTH (NOVEMBER 12-16, 2023): IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO ALABAMA, MISSISSIPPI, AND ARKANSAS WITH MR. AXEL DITTMANN, DEPUTY CHIEF OF MISSION AT THE GERMAN EMBASSY IN WASHINGTON DC. THE PURPOSE OF THE TRIP WAS TO ENHANCE MR. DITTMANN'S UNDERSTANDING OF THE STATE OF ECONOMIC AND POLITICAL AFFAIRS IN THE DEEP SOUTH REGION OF THE UNITED STATES. THE TOWN HALL KICKED OFF IN MONTGOMERY, ALABAMA WHERE THE GROUP VISITED WITH GOVERNOR KAY IVEY, DEMOCRATIC MINORITY LEADER ANTHONY DANIELS, AND THE SOUTHERN LAW AND POVERTY CENTER. IN TUSCALOOSA, ALABAMA THE GROUP VISITED THE MERCEDES-BENZ PLANT AND MET WITH PLANT LEADERSHIP, MICHAEL GOBEL. IN JACKSON, MISSISSIPPI, MEETINGS TOOK PLACE WITH JACKSON MAYOR CHOKWE ANTAR LUMUMBA AND DEMOCRATIC STATE REPRESENTATIVES, AND THE GROUP TOURED THE CIVIL RIGHTS MUSEUM. IN LITTLE ROCK, ARKANSAS, THE DELEGATION MET WITH GOVERNOR SARAH SANDERS AND HOUSE SPEAKER MATT SHEPHARD, AND TOURED THE CLINTON PRESIDENTIAL LIBRARY. MAIN TOPICS ON THE TRIP INCLUDED WORK FORCE LABOR SHORTAGES, ECONOMIC DEVELOPMENT, AND THE U.S. PRESIDENTIAL RACE IN 2024. THE TRIP ALLOWED BFNA TO CREATE NEW CONNECTIONS AND LEARN ABOUT ONGOING CHALLENGES IN THE DEEP SOUTH REGION OF THE UNITED STATES.</p> <p>SUMMER ENRICHMENT SERIES THE SUMMER ENRICHMENT SERIES (SES) INITIALLY LAUNCHED IN SUMMER 2022. IN 2023, THE PROGRAM BROUGHT TOGETHER A GROUP OF 16 GRADUATE STUDENTS AND YOUNG PROFESSIONALS WITH A STRONG INTEREST IN THE TRANSATLANTIC RELATIONSHIP. THE SES CONSISTED OF THREE SEPARATE DINNER EVENTS, EACH WITH A THEMATIC FOCUS CORRESPONDING TO RELEVANT GEOPOLITICAL EVENTS SHAPING THE TRANSATLANTIC ALLIANCE. EVENT TOPICS INCLUDED SECURITY AND DEFENSE (NATO), BILATERAL RELATIONS BETWEEN EU MEMBER STATES GERMANY AND FRANCE, AND STRATEGIC COMPETITION WITH CHINA. EACH EVENT FEATURED TWO GUEST SPEAKERS FROM THE DIPLOMATIC AND RESEARCH COMMUNITIES WHO SHARED THEIR EXPERTISE WITH THE COHORT.</p> <p>BFNA OPEN HOUSE FOR YOUNG PROFESSIONALS IN TRANSATLANTIC RELATIONS, WASHINGTON, DC (MAY 10, 2023): SARA LEMING, RESEARCH ANALYST, ORGANIZED AN OPEN HOUSE EVENT FOR 20 YOUNG PROFESSIONALS WORKING IN THE REALM OF TRANSATLANTIC RELATIONS. THE PURPOSE OF THE EVENT WAS TO INTRODUCE YOUNG TRANSATLANTICISTS TO BERTELSMANN FOUNDATION PROJECTS AND TO CONNECT LIKEMINDED INDIVIDUALS. THE EVENT BEGAN WITH A GENERAL OVERVIEW OF BFNA AND ITS WORK. TEAM MEMBERS COURTNEY FLYNN MARTINO, DANIELA MEDINA, CHLOE LAIRD, AND RYLIE MUNN EACH INTRODUCED THEIR PROJECTS AND RESEARCH PORTFOLIOS. THE TEAM HIGHLIGHTED HOW BFNA UTILIZES AUDIO VISUALS IN ITS WORK AND HIGHLIGHTED MULTIMEDIA PROJECTS INCLUDING THE TRANSATLANTIC PERISCOPE, RANGE, THE TRANSATLANTIC BAROMETER, LEADERSHIP IN ACTION, HOW TO FIX DEMOCRACY, AND BFNA DOCS. TONY SILBERFELD, DIRECTOR OF TRANSATLANTIC RELATIONS, ADDRESSED THE GROUP AS THE GUEST SPEAKER AND DESCRIBED HIS CAREER PATH AND CURRENT ROLE. THE PARTICIPANTS ASKED INSIGHTFUL QUESTIONS</p>

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		<p>ABOUT HIS WORK AND LEADERSHIP ROLE. THIS EVENT WILL BE A RECURRING SERIES THAT WILL BE HOSTED BY VARIOUS THINK TANKS IN THE DC AREA. EUROPEAN UNION DIPLOMATS TOWN HALL TRIP TO ANNAPOLIS, MD (JUNE 22, 2023): SARA LEMING, RESEARCH ANALYST, AND DANIELA MEDINA, RESEARCH ANALYST, TRAVELED TO ANNAPOLIS, MARYLAND WITH 20 EUROPEAN UNION DIPLOMATS. THE DIPLOMATS SERVE AS PUBLIC AFFAIRS OFFICERS REPRESENTING THE EU DELEGATION TO THE U.S, EUROPEAN PARLIAMENT LIAISON OFFICE, AUSTRIA, BELGIUM, THE CZECH REPUBLIC, DENMARK, FRANCE, GERMANY, GREECE, LUXEMBOURG, SLOVAKIA, AND SPAIN. THE PURPOSE OF THE DAY TRIP WAS TO ENHANCE THE DIPLOMATS UNDERSTANDING OF THE STATE OF MARYLAND AND ITS CAPITAL CITY. THE VISIT BEGAN WITH A MEETING WITH GAVIN BUCKLEY, THE MAYOR OF ANNAPOLIS, AND A TOUR OF HIS ADMINISTRATION'S SUSTAINABLE DEVELOPMENT PROJECTS. THE GROUP ALSO PARTICIPATED IN ROUNDTABLE MEETINGS WITH THE STATE OF MARYLAND'S ELECTION ADMINISTRATOR, JARED DEMARINIS, AND MARK KLEINSCHMIDT, PRESIDENT OF THE ANNE ARUNDEL CHAMBER OF COMMERCE. THE DAY CONCLUDED WITH A MEETING BETWEEN SUSAN LEE, MARYLAND SECRETARY OF STATE, AND THE EU DIPLOMATS. OVERALL, THE TRIP PROVIDED THE ATTENDEES A WELL-ROUNDED PERSPECTIVE ON THE STATE OF MARYLAND AND FACILITATED NEW PARTNERSHIPS.</p> <p>SUMMER ENRICHMENT SERIES (PART 1: BILATERAL RELATIONSHIPS GERMANY & FRANCE), BERTELSMANN FOUNDATION, WASHINGTON, DC (JUNE 28, 2023): THE BERTELSMANN FOUNDATION HOSTED A GROUP OF YOUNG PROFESSIONALS AND TWO GUEST SPEAKERS FOR PART ONE OF THE SUMMER ENRICHMENT SERIES. THE THEMATIC FOCUS OF THE EVENT WAS THE BILATERAL RELATIONSHIP BETWEEN GERMANY AND FRANCE. OUR TWO GUEST SPEAKERS WERE MS. MARIE JOURDAIN (VISITING FELLOW IN THE EUROPE PROGRAM AT THE ATLANTIC COUNCIL) AND MR. MARKUS TEGLAS (MINISTER COUNSELOR OF POLITICAL AFFAIRS AT THE GERMAN EMBASSY). THE EVENT BEGAN WITH A SHORT PRESENTATION OF THE TRANSATLANTIC BAROMETER BY COURTNEY FLYNN MARTINO. FOLLOWING THE BAROMETER PRESENTATION MS. JOURDAIN SPOKE FROM A FRENCH PERSPECTIVE AND MR. TEGLAS PROVIDED A GERMAN PERSPECTIVE. EACH SPEAKER PRESENTED FOR APPROXIMATELY FIFTEEN MINUTES ON THE HISTORICAL ROOTS OF THE FRENCH-GERMAN RELATIONSHIP, AS LEADERS OF THE EU, AND ON THE COMMON CHALLENGES THAT BOTH COUNTRIES ARE CURRENTLY FACING. THE GROUP THEN TOOK A SHORT BREAK AND ATE DINNER. FOLLOWING THE BRIEF INTERMISSION, THE GROUP RECONVENED FOR THE ROUNDTABLE PORTION OF THE EVENING. THE PARTICIPANTS REMAINED ENGAGED AND ASKED FRUITFUL QUESTIONS TO THE SPEAKER. THE EVENT ADJOURNED WITH A LIGHT DESSERT RECEPTION.</p> <p>SUMMER ENRICHMENT SERIES (PART 2: SECURITY & DEFENSE), BERTELSMANN FOUNDATION, WASHINGTON, DC (JULY 12, 2023): THE BERTELSMANN FOUNDATION HOSTED A GROUP OF YOUNG PROFESSIONALS AND TWO GUEST SPEAKERS FOR PART II OF THE SUMMER ENRICHMENT SERIES. THE THEMATIC FOCUS OF THE EVENT WAS SECURITY AND DEFENSE WITH A FOCUS ON THE NATO SUMMIT IN VILNIUS. THE TWO GUEST SPEAKERS WERE MS. MARI ETALAPAA (DEFENSE COUNSELOR AT THE EMBASSY OF FINLAND IN WASHINGTON DC) AND MR. FEDERICO BORSARI (LEONARDO FELLOW AT CEPA). MS. ETALAPAA SPOKE FROM A FINNISH PERSPECTIVE AND MR. BORSARI PROVIDED A MEDITERRANEAN POINT OF VIEW ON THE NATO SUMMIT. EACH SPEAKER PRESENTED FOR APPROXIMATELY FIFTEEN MINUTES ON THE CONTENT OF THE NATO SUMMIT, THE STATUS OF UKRAINE AS A POTENTIAL NATO MEMBER, AND THE COMMON CHALLENGES THAT ALL NATO COUNTRIES ARE CURRENTLY FACING. THE GROUP THEN TOOK A SHORT BREAK FOR DINNER. FOLLOWING THE BRIEF INTERMISSION, THE GROUP RECONVENED FOR</p>
DIRECT CHARITABLE ACTIVITY (CONTINUED)	FORM 990-PF, PART VIII-A	<p>GERMAN AMERICAN CONFERENCE, HARVARD UNIVERSITY, CAMBRIDGE, MA (OCTOBER 27-29, 2023): THE BERTELSMANN FOUNDATION PARTICIPATED IN THE GERMAN AMERICAN CONFERENCE AT HARVARD UNIVERSITY, ORGANIZED BY STUDENTS AT THE HARVARD KENNEDY SCHOOL AND ATTENDED BY STUDENTS, POLICYMAKERS, MEDIA, AND PRACTITIONERS FROM ACROSS GERMANY AND THE U.S. BFNA'S FORECASTING PROJECT, RANGE, WAS A NOTABLE ADDITION TO THIS YEAR'S CONFERENCE. PRIOR TO THE EVENT, STUDENTS HAD THE OPPORTUNITY TO ENGAGE IN A SPECIALIZED FORECASTING ACTIVITY TAILORED TO THE CONFERENCE. THROUGHOUT THE EVENT, LIVE FORECASTING EXERCISES WERE INTEGRATED INTO PANELS THAT FOCUSED ON THEMATIC AREAS SUCH AS GEOPOLITICS, DEMOCRACY, AND TECHNOLOGY.</p> <p>TRANSATLANTIC PERISCOPE THE BERTELSMANN FOUNDATION ACCELERATED THE SCALING AND PUBLIC ENGAGEMENT PROCESS FOR THE TRANSATLANTIC PERISCOPE, A DIGITAL PLATFORM THAT IDENTIFIES TRENDLINES AND KEY ISSUES THAT DEFINE THE RELATIONSHIPS BETWEEN THE UNITED STATES AND EACH OF THE 27 EU MEMBER STATES (PLUS THE UNITED KINGDOM). IN 2023, THE PERISCOPE ADDED NINE NEW PARTNER COUNTRIES INCLUDING THE FOREIGN POLICY CENTER (UK), LUSO-AMERICAN FOUNDATION (PORTUGAL), CLINGENDAEL INSTITUTE (THE NETHERLANDS), AUSTRIAN MARSHALL PLAN FOUNDATION (AUSTRIA), FINNISH INSTITUTE FOR INTERNATIONAL AFFAIRS (FINLAND), CENTER FOR ECONOMIC ANALYSIS (CROATIA), EGMONT INSTITUTE (BELGIUM), ISPI (ITALY), AND CENTER FOR DEFENSE STUDIES (ESTONIA). THE MONTHLY ACTIVE USER BASE FOR THE PLATFORM GREW TO 3,000 WITH A TEN PERCENT GROWTH IN USERS PER QUARTER IN 2023.</p> <p>TRANSATLANTIC PERISCOPE SUMMIT, MADRID, SPAIN (OCTOBER 5, 2023): THE BERTELSMANN FOUNDATION HOSTED THE INAUGURAL TRANSATLANTIC PERISCOPE SUMMIT AT THE ELCANO ROYAL INSTITUTE IN MADRID, SPAIN. PERISCOPE INSTITUTIONAL PARTNERS ATTENDED FROM 14 COUNTRIES ACROSS EUROPE (UK, GERMANY, SPAIN, PORTUGAL, ESTONIA, FINLAND, AUSTRIA, POLAND, GREECE, CROATIA, THE NETHERLANDS, BELGIUM, IRELAND, AND ITALY) TO PROVIDE BILATERAL RELATIONSHIP BRIEFINGS, BRAINSTORM IMPROVEMENTS TO THE PLATFORM, AND ESTABLISH A CONCRETE ACTION PLAN FOR COLLABORATION ONLINE AND OFFLINE. THE GATHERING WAS KICKED OFF BY ELCANO DIRECTOR CHARLES POWELL AND THE BERTELSMANN FOUNDATION'S IRENE BRAAM. SESSIONS WERE ORCHESTRATED BY BFNA'S TONY SILBERFELD AND SARA LEMING.</p> <p>FUTURE OF TRANSATLANTIC RELATIONS PANEL EVENT, IE UNIVERSITY, MADRID, SPAIN (OCTOBER 6, 2023): THE BERTELSMANN FOUNDATION AND INSTITUTO EMPRESA (IE) UNIVERSITY CO-HOSTED A PANEL DISCUSSION EVENT TITLED "THE TRANSATLANTIC PERISCOPE: A CONVERSATION ON THE FUTURE OF TRANSATLANTIC RELATIONS". THE EVENT ON IE'S CAMPUS IN MADRID BEGAN WITH INTRODUCTORY REMARKS BY ILKE TOYGUR, DIRECTOR OF THE CENTER FOR INNOVATION IN GLOBAL POLITICS AND ECONOMICS, AT IE. THE WELCOME WAS FOLLOWED BY AN INTRODUCTION TO THE PERISCOPE PLATFORM AND A LIVELY PANEL DISCUSSION FEATURING ELCANO ROYAL INSTITUTE'S CARLOTA GARCIA ENCINA, THE CENTER FOR INTERNATIONAL RELATIONS' MALGORZATA BONIKOWSKA, AND UNIVERSITY COLLEGE DUBLIN'S SCOTT LUCAS (BFNA'S PERISCOPE PARTNERS FROM SPAIN, POLAND AND IRELAND, RESPECTIVELY). THE DISCUSSION, MODERATED BY BFNA'S TONY SILBERFELD, COVERED A RANGE OF TOPICS INCLUDING THE US ELECTIONS, UKRAINE, ARTIFICIAL INTELLIGENCE, CRITICAL MINERALS, AND</p>

Identifier	Return Reference	Explanation
		<p>CHINA. FOLLOWING THE CONVERSATION, THE PANEL ENGAGED IN A Q&A SESSION WITH THE AUDIENCE COMPRISED OF STUDENTS, FACULTY, AND DIPLOMATS. CROATIA PERISCOPE WEBINAR ON THE FUTURE OF U.S.-CROATIA RELATIONS (OCTOBER 13, 2023): THE ZAGREB-BASED CENTRE FOR ECONOMIC POLICY ANALYSIS (CEA) AND THE BERTELSMANN FOUNDATION CO-HOSTED A WEBINAR THAT SERVED AS A LAUNCH FOR THE CROATIA MODULE OF THE TRANSATLANTIC PERISCOPE AND AN IN-DEPTH DISCUSSION ON THE FATE OF U.S.-CROATIA RELATIONS. THE EVENT KICKED OFF WITH A PRESENTATION AND TOUR OF THE PERISCOPE BY BFNA'S TONY SILBERFELD. FOLLOWING THE INTRODUCTION OF THE PERISCOPE, IGOR SLOSAR OF CEA MODERATED A PANEL CONVERSATION THAT INCLUDED VEDRAN BROZOVIC, AMAZON, GORAN VOJKOVIC, UNIVERSITY OF ZAGREB, DOMAGOJ JURICIC OF THE POLITICAL CONSULTING FIRM MKPS, AND BFNA'S TONY SILBERFELD. THE PANEL COVERED A RANGE OF ISSUES INCLUDING TRADE, DOUBLE TAXATION, ACADEMIC COLLABORATION, AND CURRENT GEOPOLITICAL CHALLENGES IN THE TRANSATLANTIC SPACE AND BEYOND. THE CONVERSATION CONCLUDED WITH A LIVELY Q&A WITH THE AUDIENCE.</p> <p>TRANSATLANTIC PERISCOPE LAUNCH, VIENNA, AUSTRIA (NOVEMBER 15, 2023): THE U.S. EMBASSY AND THE AUSTRIAN MARSHALL PLAN FOUNDATION CO-HOSTED AN EVENT TO MARK THE LAUNCH OF THE TRANSATLANTIC PERISCOPE U.S.-AUSTRIA MODULE AT THE AMERIKA HAUS IN VIENNA. FOLLOWING AN INTRODUCTION TO THE PERISCOPE, THE AUSTRIAN MARSHALL PLAN FOUNDATION'S VICE CHAIRWOMAN MONIKA ROSEN MODERATED A PANEL DISCUSSION FOCUSING ON THE STATE OF TRANSATLANTIC RELATIONS IN A WORLD ON FIRE. DR. ROSEN WAS JOINED BY BFNA'S TONY SILBERFELD, AUSTRIAN AMBASSADOR EVA NOWOTNY, AND THOMAS EDER FROM THE AUSTRIAN INSTITUTE FOR INTERNATIONAL AFFAIRS. THE DEBATE COVERED A RANGE OF TOPICS INCLUDING THE 2024 U.S. ELECTIONS, THE FUTURE OF TRANSATLANTIC SUPPORT FOR UKRAINE, AND POLICY COORDINATION ON CHINA IN THE AFTER MATH OF THE XI-BIDEN MEETING. AFTER THE CONVERSATION ON THE DAIS, PANELISTS HAD AN ENGAGING Q&A SESSION WITH THE AUDIENCE.</p> <p>EGMONT HIGH-LEVEL SEMINAR ON THE BE-U.S. TRANSATLANTIC RELATIONSHIP, WASHINGTON, DC (DECEMBER 14, 2023): THE BERTELSMANN FOUNDATION PARTICIPATED IN A HIGH-LEVEL SEMINAR ON THE BE-U.S. TRANSATLANTIC RELATIONSHIP. THE EVENT WAS HOSTED BY EGMONT, THE PERISCOPE PARTNERS FOR THE U.S.-BELGIUM MODULE. SARA LEMING, RESEARCH ANALYST, VIRTUALLY PRESENTED THE TRANSATLANTIC PERISCOPE PROJECT. THE EVENT WAS ATTENDED BY OVER 50 PEOPLE INCLUDING THE U.S. AMBASSADOR TO BELGIUM, MICHAEL ADLER. THE GOAL OF THE SEMINAR WAS TO DISCUSS THE CURRENT STATE OF U.S.-BELGIUM RELATIONS AND TO INTRODUCE PRIORITIES OF THE INCOMING BELGIAN PRESIDENCY.</p> <p>US ELECTION SERIES IN 2024, SIGNIFICANT ELECTIONS WILL TAKE PLACE ON BOTH SIDES OF THE ATLANTIC. IN ANTICIPATION OF THESE ELECTIONS, THE BERTELSMANN FOUNDATION DEVELOPED THE FRAMEWORK FOR THE USA 2024 ELECTION HUB, A DIGITAL PLATFORM DEDICATED TO HIGHLIGHTING THE CRUCIAL PRESIDENTIAL AND CONGRESSIONAL VOTES IN THE UNITED STATES. RECOGNIZING THE IMMENSE IMPORTANCE FOR THE NATION AND THE GLOBAL COMMUNITY, THE PLATFORM WILL OFFER A DIVERSE ARRAY OF EDUCATIONAL MULTIMEDIA RESOURCES. THESE RESOURCES WILL AIM TO PROVIDE ESSENTIAL INFORMATION FOR COMPREHENDING THE PRIMARY SEASON, THE GENERAL ELECTION, AND THE POST-ELECTION TRANSITION. THE PLATFORM WILL SERVE AS A COMPREHENSIVE RESOURCE, OFFERING PODCASTS, BLOGS, INFOGRAPHICS, AND EXPLANATORY ANIMATIONS. IT WILL CATER TO STUDENTS, JOURNALISTS, DIPLOMATS, THE POLICYMAKING COMMUNITY, AND THE PUBLIC ON BOTH SIDES OF THE ATLANTIC.</p>

TY 2023 IRS 990 e-File Render

Name: BERTELSMANN FOUNDATION (NA) INC

EIN: 71-1048702

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
FURNITURE & EQUIPMENT	500,530	494,289	6,241	6,241
HARDWARE & SOFTWARE	362,696	312,118	50,578	50,578
WEBSITE	378,978	330,015	48,963	48,963

TY 2023 IRS 990 e-File Render

Name: BERTELSMANN FOUNDATION (NA) INC

EIN: 71-1048702

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL SERVICES	2,533	0	0	2,533

TY 2023 IRS 990 e-File Render**Name:** BERTELSMANN FOUNDATION (NA) INC**EIN:** 71-1048702

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MARKETING AND ADVERTISING	318,176	0	0	318,204
EVENT EXPENSES	72,394	0	0	70,619
MISCELLANEOUS - OPERATING EXP	68,436	0	0	68,436
OFFICE EXPENSES	54,241	0	0	54,241
MEDIA (SUBSCRIPTION)	29,526	0	0	29,526
INSURANCE	25,297	0	0	25,297
TELECOMMUNICATIONS	24,679	0	0	24,679
STAFF DEVELOPMENT	23,646	0	0	23,646
PRINTING AND PUBLICATIONS	23,093	0	0	23,093
REPAIRS AND MAINTENANCE	13,905	0	0	13,905
EQUIPMENT AND SUPPLIES	13,098	0	0	13,098
HONORARIA	4,300	0	0	4,300
POSTAGE AND SHIPPING	2,570	0	0	2,570
BANK CHARGES	510	0	0	510
TRANSLATIONS	40	0	0	40

TY 2023 IRS 990 e-File Render

Name: BERTELSMANN FOUNDATION (NA) INC

EIN: 71-1048702

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL PROCESSING	2,872	0	0	2,872
COMPUTER NETWORKING & TELECOMM	35,650	0	0	35,650
COMPUTER SUPPORT & MAINTENANCE	36,664	0	0	36,664
CONSULTANTS	3,538	0	0	3,538
TRANSLATIONS	2,918	0	0	2,918
WEB SUPPORT	1,151	0	0	1,151
OTHER PROFESSIONAL FEES	299,874	0	0	299,874

TY 2023 IRS 990 e-File Render

Name: BERTELSMANN FOUNDATION (NA) INC

EIN: 71-1048702

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAXES - REAL ESTATE	80,326	0	0	80,345