

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 2024, or tax year beginning 01-01-2024, and ending 12-31-2024

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. G Check all that apply: Initial return, Initial return of a former public charity, Final return, Amended return, Address change, Name change. H Check type of organization: Section 501(c)(3) exempt private foundation, Section 4947(a)(1) nonexempt charitable trust, Other taxable private foundation. I Fair market value of all assets at end of year: \$2,532,748. J Accounting method: Cash, Accrual, Other (specify).

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 (cash basis only). Rows include: 1 Contributions, gifts, grants, etc., received (3,545,011); 2-12 Revenue items; 13-26 Operating and Administrative Expenses; 27 Subtotal and final totals.

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	2,026,421	2,362,362	2,362,362
	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	133,579	106,031	106,031
	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 ▶ <u>1,270,899</u> Less: accumulated depreciation (attach schedule) ▶ <u>1,206,544</u>	105,782	64,355	64,355
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,265,782	2,532,748	2,532,748	
Liabilities	17 Accounts payable and accrued expenses	145,770	138,168	
	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)	145,770	138,168	
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	2,120,012	2,394,580	
	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)	2,120,012	2,394,580		
30 Total liabilities and net assets/fund balances (see instructions)	2,265,782	2,532,748		

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	2,120,012
2 Enter amount from Part I, line 27a	2	274,568
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	2,394,580
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	2,394,580

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows 1a through 1e.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows a through e.

Table with 4 columns: (i) F.M.V. as of 12/31/69, (j) Adjusted basis as of 12/31/69, (k) Excess of col. (i) over col. (j), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)). Rows a through e.

Summary rows for capital gain net income (2) and net short-term capital gain or (loss) (3).

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

Table for excise tax calculations with rows 1a through 11, including exemptions, tax under section 511, and tax due.

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 2024 or the taxable year beginning in 2024?
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 2024, 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 2024?
- 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 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?
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 2024 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 2024.)
- 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 2024?

	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	348,616	56,237	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	207,357	56,335	0
ANTHONY SILBERFELD 1108 16TH STREET NW WASHINGTON, DC 20036	TRANSATLANTIC REL DR 35.00	202,636	40,877	0
SAMUEL PUTTER-GEORGE 1108 16TH STREET NW WASHINGTON, DC 20036	GLOBAL/DIGITAL ADVIS 35.00	117,928	27,187	0
MEGAN LONG 1108 16TH STREET NW WASHINGTON, DC 20036	PROJECT COORDINATOR 35.00	78,437	15,736	0
CHLOE-ALEXANDRA LADD 1108 16TH STREET NW WASHINGTON, DC 20036	MANAGER, TRANSATLANT 35.00	76,919	16,298	0
Total number of other employees paid over \$50,000.				3

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
CULTIVATE LABS 447 HIGHCREST DRIVE WILMETTE,IL 60091	WEB DEVELOPMENT	149,697
SQUIRRO AMERICAS INC 902 BROADWAY NEW YORK,NY 10010	WEB DEVELOPMENT	98,400
GAUGE THEORY CREATIVE CO 2919 MICHAEL AVENUE LOS ANGELES,CA 90066	VIDEO PRODUCTION	79,737
CRITERIA COMUNICACIONES CALLE 50 Y 64 ESTE SAN FRANCISCO OF 207 PANAMA PM	VIDEO PRODUCTION	71,700
THEOHARIS MANAGEMENT 5724 GENERAL WASHINGTON DRIVE ALEXANDRIA,V A 22312	BLDG OPER. EXP. & CONDO INSURANCE	71,589

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 (2024) FOR FURTHER INFORMATION.	1,951,149
2 TRANSATLANTIC RELATIONS - SEE ATTACHED BERTELSMANN FOUNDATION PROJECT SUMMARIES (2024) FOR FURTHER INFORMATION.	1,254,686
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	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	2,531,881
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,531,881
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	2,531,881
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	37,978
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	2,493,903
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	124,695

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 2024 from Part V, line 5.	2a	
b	Income tax for 2024. (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	3,209,866
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	3,209,866

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.				
b Total for prior years: 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2024:				
a From 2019.				
b From 2020.				
c From 2021.				
d From 2022.				
e From 2023.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ _____				
a Applied to 2023, 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 2024 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2024. (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 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				
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 2019 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2020				
b Excess from 2021				
c Excess from 2022.				
d Excess from 2023				
e Excess from 2024				

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 2024, 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

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test—enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed

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)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Table with columns: Tax year, (a) 2024, (b) 2023, (c) 2022, (d) 2021, (e) Total. Rows include data for lines 2a-e and 3a-d.

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)				
a <i>Paid during the year</i> GERMAN MARSHALL FUND OF THE US 1744 R STREET NW WASHINGTON, DC 20009	NONE	P C	GMF CITIES PROJECT	10,000
GERMAN AMERICAN PARTNERSHIP PROGRAM 30 IRVING PLACE NEW YORK, NY 10003	NONE	P C	SUPPORT THE GERMAN AMERICAN PARTNERSHIP PROGRAM SCHOOL EXCHANGE PROGRAM	10,000
HARVARD UNIVERSITY 1033 MASSACHUSETTS AVE 3RD FL CAMBRIDGE, MA 02138	NONE	P C	SUPPORT HARVARD'S 2024 GERMAN-AMERICAN CONFERENCE	10,000
Total ▶ 3a				30,000
b <i>Approved for future payment</i>				
Total ▶ 3b				0

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Table with 5 main columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include categories like Program service revenue, membership dues, interest on savings, dividends, rental income, investment income, gain or loss from sales, and other revenue. Total for line 13 is 28,000.

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

Table with 2 columns: Line No. and description. Row 1 contains 'N/A'. The rest of the rows are blank for providing explanations of exempt purposes.

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule of Contributors

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

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 <hr/> CARL-BERTELSMANN-STRASSE 256 <hr/> GUETERSLOH, GUETERSLOH 33311 GM	<hr/> \$ 3,545,011	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<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
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(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
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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

Return to Form

Software ID:

Software Version:

TY 2024 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	30,962	0	0	30,962

TY 2024 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 VIII-A	DEPRECIATION STATEMENT:FURNITURE AND EQUIPMENT \$14,935COMPUTER SOFTWARE \$33,287LEASEHOLD IMPROVEMENTS \$21,900 -----DEPRECIATION EXPENSE \$70,122 =====
DIRECT CHARITABLE ACTIVITY	FORM 990-PF, PART VIII-A	<p>BERTELSMANN FOUNDATION PROJECT SUMMARIES & EVENTS (2024)ADMINISTRATION (CC 100, 110, 120)TRANSATLANTIC SEMINAR, GLOBAL EXECUTIVE MBA PROGRAM, ERASMUS UNIVERSITY SCHOOL OF BUSINESS, WASHINGTON, DC (FEBRUARY 28, 2024): THE BERTELSMANN FOUNDATION HOSTED A HALF-DAY SEMINAR FOR THE PARTICIPANTS OF THE GLOBAL EXECUTIVE MBA PROGRAM OF THE ERASMUS UNIVERSITY (ROTTERDAM, THE NETHERLANDS) SCHOOL OF BUSINESS TO DISCUSS THE GEOPOLITICS OF THE EU, US CHINA RELATIONSHIP, THE ECONOMIC, POLITICAL AND ETHICAL NAVIGATION OF GEOPOLITICS, AND THE FUTURE OF THE TRANSATLANTIC RELATIONS. THE HALF-DAY SESSION WAS PART OF THE PROGRAM'S EXPERIENTIAL LEARNING WEEK IN WASHINGTON, DC, AND WAS KICKED-OFF WITH A PRESENTATION OF BFNA'S WORK BY IRENE BRAAM.BERTELSMANN TRANSFORMATION INDEX (BTI) ROUNDTABLE: 2024 TRANSFORMATION INDEX, BERTELSMANN FOUNDATION, WASHINGTON, DC (JULY 17, 2024): THE BERTELSMANN FOUNDATION HOSTED A ROUNDTABLE PRESENTING THE BERTELSMANN STIFTUNG'S RESEARCH AND TAKEAWAYS FROM THE 2024 TRANSFORMATION INDEX. SENIOR EXPERTS FROM THE BERTELSMANN STIFTUNG SABINE DONNER AND HAUKE HARTMANN PRESENTED THEIR WORK. IRENE BRAAM, EXECUTIVE DIRECTOR, AND CHLOE LADD, MANAGER OF TRANSATLANTIC RELATIONS, GAVE OPENING REMARKS. GUESTS INVITED WERE PART OF THE BERTELSMANN FOUNDATION FELLOWSHIP NETWORK. THE ROUNDTABLE WAS AN OPPORTUNITY FOR OPEN DISCUSSION ON TRENDS AROUND DEMOCRACY IN THE WORLD. 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 2024, SEASON FIVE, PART TWO INCLUDED PODCASTS AND VIDEO EPISODES COVERING 100 YEARS OF AMERICAN DEMOCRACY BETWEEN 1924 AND 2024. THE SEASON UNCOVERED THE COMPLEXITIES OF US HISTORY AND ASKED DISTINGUISHED GUESTS WHY IT REMAINS THE MOST ICONIC AND YET MISUNDERSTOOD DEMOCRATIC SYSTEM IN THE WORLD. THE SEASON FEATURED INTERVIEWS WITH YUVAL LEVIN, RAY SUAREZ, ELIZABETH SAUNDERS, JEFFREY ROSEN AND OTHERS.HOW TO FIX DEMOCRACY SCREENING, HILLSIDE CLUB, BERKELEY, CA (OCTOBER 15, 2024): BFNA'S DOCUMENTARY FILM, HOW TO FIX DEMOCRACY, WAS SCREENED AT THE BERKELEY HILLSIDE CLUB IN CALIFORNIA. THE SCREENING WAS FOLLOWED BY A PANEL DISCUSSION LED BY ANDREW KEEN, HOST OF THE HOW TO FIX DEMOCRACY PODCAST.DEMOCRACY & CITIZENSHIP ROUNDTABLE DISCUSSION, WASHINGTON, DC (NOVEMBER 13, 2024): BFNA, IN COLLABORATION WITH HISTORIAN DEREK LEEBAERT AND HUMANITY IN ACTION, THE PARTNER OF THE HOW TO FIX DEMOCRACY PODCAST, CO-HOSTED A ROUNDTABLE DISCUSSION EXPLORING DEMOCRACY, SOLIDARITY AND CITIZENSHIP. THE DISCUSSION WAS PRECEDED BY THE SCREENING OF A SHORT DOCUMENTARY FILM ON THE DANISH RESCUE AND WAS MODERATED BY HIA HONORARY PRESIDENT JUDITH GOLDSTEIN.LEADERSHIP IN ACTIONTHE BERTELSMANN FOUNDATION PARTNERED WITH THE ASPEN MINISTERS FORUM TO COMPLETE 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.THE INTERVIEWS FOR THESE FILMS WERE COMPLETED IN 2023, BUT THE EDITING, COMPOSITION, REVIEW AND RELEASE OCCURRED IN 2024. 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 2024, THIS MEETING TOOK PLACE IN LUGANO, SWITZERLAND, AND GATHERED MANY FOREIGN MINISTERS REPRESENTING EVERY CONTINENT ON EARTH TO DISCUSS THE HOT SPORT IN GLOBAL AFFAIRS FOR THE YEAR AHEAD. DURING THIS CONFERENCE, BERTELSMANN FOUNDATION RECORDED A SERIES OF NEW INTERVIEWS THAT WILL BE EDITED AND RELEASED IN A NEW SEASON OF LEADERSHIP IN ACTION IN 2025. ASPEN MINISTERS FORUM, LUGANO, SWITZERLAND (DECEMBER 12-15, 2024): THE ASPEN MINISTERS FORUM CONVENED FOR ITS 28TH SESSION IN LUGANO, SWITZERLAND. THIS YEAR'S MEETING, IN PARTNERSHIP WITH THE ASPEN INSTITUTE, BERTELSMANN FOUNDATION, AND THE VERSTANDIG FAMILY FOUNDATION, TITLED BUILDING STABILITY IN A FRACTURED WORLD, BROUGHT TOGETHER TWO DOZEN FORMER FOREIGN MINISTERS FROM AROUND THE WORLD, ALONG WITH TEN EXPERTS FROM ACADEMIA, GOVERNMENT, ARTS AND CULTURE, AND THE THINK TANK COMMUNITY. FOLLOWING TWO DAYS OF ROUNDTABLE DISCUSSIONS, THE BERTELSMANN FOUNDATION RECORDED SEASON FOUR OF ITS LEADERSHIP IN ACTION SERIES FEATURING FORMER SOUTH KOREAN FOREIGN MINISTER KANG KYUNG-WHA AND FORMER JORDANIAN FOREIGN MINISTER MARWAN MUASHER.VIDEOS/NO COLLAR ECONOMYTHE BERTELSMANN FOUNDATION CONTINUED ITS WORK IN THE DOCUMENTARY FILM SPHERE WITH A SPECIFIC FOCUS ON ECONOMIC, POLITICAL, SOCIAL, AND DIGITAL ISSUES, WITH AN EMPHASIS ON WHERE THOSE ISSUES OVERLAP. SPECIFICALLY, THE BERTELSMANN FOUNDATION WROTE, EDITED, AND PRODUCED THE DOCUMENTARY FILM "LITHIUM RISING: THE RACE FOR CRITICAL MINERALS", A FEATURE-LENGTH FILM FOCUSED ON THE GLOBAL COMPETITION TO ACCESS THE MINERALS REQUIRED TO MAKE A LITHIUM BATTERY. TO ACCOMPANY THIS FILM, THE INITIATIVE COMPOSED A LONG-FORM STUDY ON THE TOPIC OF CRITICAL MINERALS THAT WILL BE PUBLISHED IN 2025. ADDITIONALLY, THE BERTELSMANN FOUNDATION HELD A SERIES OF SCREENING EVENTS FOR PRIOR DOCUMENTARIES SUCH AS "LOCAL 1196: A STEELWORKERS STRIKE", "TINDERBOX, BELT AND</p>

Identifier	Return Reference	Explanation
		<p>ROAD: CHINA IN THE BALKANS", AND "BARRY FARM: COMMUNITY, LAND, AND JUSTICE IN WASHINGTON DC." AS PART OF THIS WORK, THE INITIATIVE SUPPORTED THE NATIONAL SYNDICATION OF "BARRY FARM" ON PBS. VIRTUAL SCREENING OF TINDERBOX, BELT & ROAD: CHINA IN THE BALKANS, U.S. DEPARTMENT OF STATE FOREIGN SERVICE INSTITUTE (JANUARY 18, 2024): THE US DEPARTMENT OF STATE FOREIGN SERVICE INSTITUTE SCREENED THE BERTELSMANN FOUNDATION DOCUMENTARY "TINDERBOX, BELT & ROAD: CHINA IN THE BALKANS" IN AN EVENT FOR THE CLASS OF NEW DIPLOMATS AND FOREIGN SERVICE OFFICERS PREPARING TO ASSUME POSTS IN EUROPE. FOLLOWING THE FILM, SAMUEL GEORGE, BERTELSMANN FOUNDATION'S GLOBAL MARKETS & DIGITAL ADVISOR, JOINED A PANEL WITH FOREIGN SERVICE SPECIALIST SARAH LUNDQUIST NUUTINEN TO DISCUSS KEY ISSUES IN THE US-EUROPE-CHINA RELATIONSHIP. THE EVENT DEMONSTRATED THE BERTELSMANN FOUNDATION'S IMPACT IN DIRECTLY INFLUENCING FRONTLINE POLICYMAKERS IN THE TRANS-ATLANTIC RELATIONSHIP. THIS MARKS THE LATEST IN A SERIES OF EVENTS THE US DEPARTMENT OF STATE FOREIGN SERVICE INSTITUTE HAS INVITED BERTELSMANN FOUNDATION TO PARTICIPATE IN. SCREENING OF TINDERBOX, BELT & ROAD: CHINA IN THE BALKANS, NEW YORK UNIVERSITY, NEW YORK, NY (FEBRUARY 28, 2024): THE BERTELSMANN FOUNDATION PRESENTED ITS FILM "TINDERBOX, BELT & ROAD: CHINA IN THE BALKANS" AT NEW YORK UNIVERSITY IN COLLABORATION WITH NYU'S CENTER FOR EUROPEAN AND MEDITERRANEAN STUDIES AND THE EASTERN EUROPEAN WORKSHOP. STUDENTS WATCHED THE FILM IN ADVANCE, AND THEN JOINED A LIVE PANEL EVENT THAT FEATURED BOJAN FRANCUZ (NYU CENTER ON INTERNATIONAL COOPERATION), MARIA ADELE CARRAI (GLOBAL CHINA STUDIES, NYU SHANGHAI), LARRY WOLFF AND STEPHEN GROSS (NYU CEMS), ALONG WITH THE FILM'S DIRECTOR, SAMUEL GEORGE OF THE BERTELSMANN FOUNDATION. THE DISCUSSION DEMONSTRATED THE BERTELSMANN FOUNDATION'S IMPACT IN ENGAGING LEADING INSTITUTIONS OF TRANS-ATLANTIC ACADEMIA, AS WELL AS AN ABILITY TO ENGAGE STUDENTS. SCREENING OF BARRY FARM: COMMUNITY, LAND AND JUSTICE, NEW YORK UNIVERSITY, WASHINGTON, DC (FEBRUARY 29, 2024): THE BERTELSMANN FOUNDATION COLLABORATED WITH NEW YORK UNIVERSITY IN WASHINGTON, DC, AND THE NYU JOHN BRADEMAs CENTER FOR A SCREENING OF THE BERTELSMANN FOUNDATION DOCUMENTARY "BARRY FARM: COMMUNITY, LAND AND JUSTICE IN WASHINGTON DC". FOLLOWING THE FILM, BERTELSMANN FOUNDATION'S GLOBAL MARKETS & DIGITAL ADVISOR SAMUEL GEORGE JOINED THE FILM'S CO-DIRECTOR SABIYHA PRINCE AND NYU PROFESSOR VICKY KIECHEL FOR A PANEL CONVERSATION. THE CONVERSATION FOCUSED ON THE IMPACT OF A HISTORY OF RACISTS AND CLASSIST ECONOMIC POLICIES, AND HOW THE OUTCOME OF THOSE POLICIES CAN BE ADDRESSED. THIS EVENT EVIDENCED THE FOUNDATION'S IMPACT IN THE ACADEMIC COMMUNITY AS WELL AS AN ABILITY TO GENERATE AN INCLUSIVE CONVERSATION. SCREENING OF LOCAL 1196: A STEELWORKERS STRIKE, OBERLIN COLLEGE, OBERLIN, OHIO (MARCH 19, 2024): THE BERTELSMANN FOUNDATION PARTNERED WITH OBERLIN COLLEGE FOR A PRESENTATION OF THE BERTELSMANN FOUNDATION DOCUMENTARY "LOCAL 1196: A STEELWORKERS STRIKE". THE PRESENTATION WAS PART OF BERTELSMANN FOUNDATION'S 2024 ELECTION ACTIVITIES. FOLLOWING THE FILM, BERTELSMANN FOUNDATION GLOBAL MARKETS & DIGITAL ADVISOR SAMUEL GEORGE JOINED OBERLIN COLLEGE PROFESSOR GEOFF PINGREE FOR A CONVERSATION ON THE THEMES OF THE FILM WITH THE STUDENTS AND AUDIENCE MEMBERS. THE EVENT DEMONSTRATED THE BERTELSMANN FOUNDATION'S ABILITY TO ENGAGE AUDIENCES BEYOND WASHINGTON, DC, IN DIALOGUE ABOUT THE IMPORTANCE OF ENGAGEMENT IN THE DEMOCRATIC PROCESS, AS WELL AS THE FOUNDATION'S SUCCESS IN ENGAGING THE ACADEMIC COMMUNITY. SCREENING OF LOCAL 1196: A STEELWORKERS STRIKE, BATTLE OF HOMESTEAD FOUNDATION, PITTSBURGH, PA (MARCH 19, 2024): THE BERTELSMANN FOUNDATION COLLABORATED WITH THE BATTLE OF HOMESTEAD FOUNDATION AND THE OFFICE OF STATE SENATOR LINDSEY WILLIAMS FOR A PRESENTATION OF "LOCAL 1196: A STEELWORKERS STRIKE" AT A CINEMA IN PITTSBURGH. THE PRESENTATION WAS PART OF THE BERTELSMANN FOUNDATI</p>
DIRECT CHARITABLE ACTIVITY (CONTINUED)	FORM 990-PF, PART VIII-A	<p>THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) AIMS TO STRENGTHEN THE TIES AMONG US LEGISLATIVE BODIES, GERMAN BUNDESTAG, THE EUROPEAN PARLIAMENT (EP), AND THE PRIVATE SECTOR. BFF IS THE BERTELSMANN FOUNDATION'S FLAGSHIP PROJECT HELPING TO CREATE A COMMON TRANSATLANTIC POLITICAL CULTURE IN ORDER TO FACILITATE BETTER POLICY COOPERATION AND EXCHANGE BEST-PRACTICES IN ALL THREE LEGISLATIVE BODIES AND KEY INDUSTRY ACTORS. BFF CONNECTED US STATE LEGISLATORS, BUNDESTAG AND EP STAFF WITH SIMILAR POLICY EXPERTISE AND PROVIDED THEM WITH DEEPER AWARENESS OF THE LEGISLATIVE PROCESSES AND THE POLITICAL AND INSTITUTIONAL CHALLENGES THAT EXIST ACROSS THE ATLANTIC. IN 2024, BFF FOCUSED ON DEVELOPING TRANSATLANTIC POLICY CENTERED AROUND THE FUTURE OF DEMOCRACY. THE PROGRAM WAS COMPOSED OF TWO RESEARCH TRIPS, ONE IN BRUSSELS AND ONE IN WASHINGTON, DC, VIRTUAL SESSIONS WITH EXTERNAL EXPERTS, AS WELL AS A FINAL PUBLICATION INCORPORATING THE WORK OF EACH FELLOW. PARTICIPANTS LEARNED TOGETHER, SHARED EXPERTISE, AND FORGED COMMON SOLUTIONS. U.S. ELECTIONS ROUNDTABLE AND BERTELSMANN FOUNDATION FELLOWSHIP (BFF) ALUMNI EVENT, BERLIN, GERMANY (APRIL 17, 2024): THE BERTELSMANN FOUNDATION HOSTED A BERTELSMANN FOUNDATION FELLOWSHIP ALUMNI EVENT IN BERLIN, IN THE BERTELSMANN STIFTUNG OFFICES, AROUND THE U.S. ELECTIONS. THE ALUMNI ENGAGED IN AN HOUR-LONG ROUNDTABLE AND Q&A THAT WAS MODERATED BY CHLOE LADD OF THE BERTELSMANN FOUNDATION. COURTNEY FLYNN MARTINO (BERTELSMANN FOUNDATION) AND BRANDON BOHRN (BERTELSMANN STIFTUNG) DISCUSSED THE U.S. ELECTIONS AND THEIR DYNAMICS. MS. FLYNN-MARTINO DISCUSSED THE U.S. ELECTION PROJECT AT THE BERTELSMANN FOUNDATION AND HER TAKEAWAYS FROM HER RESEARCH. MR. BOHRN DISCUSSED THE BERTELSMANN STIFTUNG'S WORK AROUND THE U.S. ELECTIONS AND A POTENTIAL TRUMP 2.0 SCENARIO. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) VIRTUAL SESSION 1 (MAY 7, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED FOR ITS FIRST VIRTUAL SESSION. THE SESSION WAS AN OPPORTUNITY FOR FELLOWS TO INTRODUCE THEMSELVES. FELLOWS WERE ASKED TO ANSWER TWO QUESTIONS: WHY DEFEND DEMOCRACY? WHY DID YOU APPLY TO THE FELLOWSHIP? THE SESSION ENDED WITH A GENERAL OVERVIEW OF THE PROGRAMMING THROUGH OCTOBER. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) VIRTUAL SESSION 2 (MAY 14, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED FOR ITS SECOND VIRTUAL SESSION. THIS SESSION PROVIDED FELLOWS AN OPPORTUNITY TO LEARN ABOUT EUROPEAN INSTITUTIONS AND PRIORITIES FOR THE NEXT ELECTIONS TO BE HELD IN JUNE. THE SESSION WAS LED BY EXTERNAL EXPERT MICHELE ZAGORDO, SENIOR AUDITOR FOR THE EUROPEAN COURT OF AUDITORS. MR. ZAGORDO FIRST DISCUSSED EU INSTITUTIONS AND THE ELECTIONS. FOLLOWING THE PRESENTATION,</p>

Identifier	Return Reference	Explanation
		<p>FELLOW SLAVINA ANCHEVA MODERATED A Q&A WITH THE FELLOWS. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) WELCOME EVENT, WASHINGTON, DC (MAY 17 2024): THE BERTELSMANN FOUNDATION HOSTED A WELCOME EVENT FOR THE 2024 BERTELSMANN FOUNDATION FELLOWS BASED IN DC. THE NETWORKING EVENT PROVIDED FELLOWS AN OPPORTUNITY TO DISCUSS THE STATE OF DEMOCRACY, PRIOR TO THE JULY IN-PERSON, KICK-OFF MEETINGS. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) VIRTUAL SESSION 3 (MAY 29, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED FOR ITS THIRD VIRTUAL SESSION. THE SESSION PROVIDED BFNA FELLOWS AN OPPORTUNITY TO LEARN ABOUT AMERICAN INSTITUTIONS AND PRIORITIES FOR THE NOVEMBER ELECTIONS. THE SESSION WAS LED BY EXTERNAL EXPERT CASEY BURGAT, LEGISLATIVE AFFAIRS PROGRAM DIRECTOR AT GEORGE WASHINGTON UNIVERSITY. FOLLOWING MR. BURGAT'S PRESENTATION, FELLOW AUBREY WILSON MODERATED A Q&A SESSION WITH THE PARTICIPANTS. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) VIRTUAL SESSION 4 (JUNE 4, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED FOR ITS FOURTH VIRTUAL SESSION. THE SESSION PROVIDED BFNA FELLOWS AN OPPORTUNITY TO LEARN ABOUT ELECTIONS IN INDIA AND THE IMPACT OF THEIR RESULTS. THE SESSION WAS LED BY EXTERNAL EXPERT OSAMA MANZAR, FOUNDER OF THE DIGITAL EMPOWERMENT FOUNDATION. MR. MANZAR DISCUSSED DIGITAL NARRATIVES IN INDIA AND THEIR IMPACT ON THE ELECTIONS. FOLLOWING THE PRESENTATION, FELLOW ANDREW KOLB MODERATED A Q&A SESSION WITH THE PARTICIPANTS. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) VIRTUAL SESSION 5 (JUNE 12, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED FOR ITS FIFTH VIRTUAL SESSION. THE SESSION PROVIDED FELLOWS AN OPPORTUNITY TO LEARN ABOUT ELECTIONS IN TAIWAN AND EFFORTS TO COMBAT FOREIGN INTERFERENCE. THE SESSION WAS LED BY EXTERNAL EXPERT TIM NIVEN, RESEARCH LEAD AT DOUBLE THINK LAB. MR. NIVEN DISCUSSED THE FOREIGN INTERFERENCE FRAMEWORK THAT TAIWAN IS EXPLORING TO COMBAT THREATS TO THEIR DEMOCRACY. FOLLOWING THE PRESENTATION, FELLOW KELSEY RITCHIE-FRIERSON MODERATED A Q&A SESSION WITH THE PARTICIPANTS. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) VIRTUAL SESSION 6 (JUNE 25, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED FOR ITS SIXTH VIRTUAL SESSION. THIS SESSION PROVIDED FELLOWS AN OPPORTUNITY TO LEARN ABOUT ELECTIONS IN MEXICO AND UPCOMING PROPOSED POLITICAL REFORMS. THE SESSION WAS LED BY EXTERNAL EXPERT LILA ABED, ACTING DIRECTOR OF THE WILSON CENTER'S MEXICO CENTER. MS. ABED COVERED THE CURRENT TRANSITORY PHASE MEXICO FINDS ITSELF IN, WITH A DEEP DIVE INTO THE UPCOMING PROPOSED ELECTORAL AND INSTITUTIONAL REFORMS. FOLLOWING THE PRESENTATION, FELLOW RAFAEL GOLDZWEIG MODERATED A Q&A SESSION WITH THE FELLOWS. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) WELCOME, WASHINGTON, DC (JULY 21, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) KICKED OFF ITS IN-PERSON TRIP TO DC WITH A WELCOME DINNER AT THE DARCY HOTEL IN WASHINGTON, DC. THE EVENT PROVIDED FELLOWS AN OPPORTUNITY TO ENGAGE AND NETWORK PRIOR TO THE WEEK OF SESSIONS HELD IN DC. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) SESSION DAY 1, WASHINGTON, DC (JULY 22, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED ITS FIRST ALL DAY SESSIONS. THE FIRST MORNING SESSION WAS HELD IN THE BFNA FIRST-FLOOR CONFERENCE ROOM FOR AN EXPECTATION SETTING SESSION WITH THE FELLOWS. FELLOWS THEN MET WITH BLAINE VOLPE, SENIOR DIRECTOR OF MEMBERSHIP AT FUTURE CAUCUS, AROUND THE NEXT GENERATION OF LEADERS IN THE UNITED STATES. THE AFTERNOON CONSISTED OF A TWO-HOUR SEMINAR WITH ASPEN INSTITUTE AROUND DEMOCRACY. THE DAY CONCLUDED AT THE GERMAN MARSHALL FUND WITH TARSIS DUNLOP, SENIOR PROGRAM OFFICER, TO DISCUSS GMF CITIES AND LOCAL EFFORTS AROUND DEMOCRACY. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) SESSION DAY 2, WASHINGTON, DC (JULY 23, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED ITS SECOND ALL DAY SESSIONS. A MORNING WORKSHOP WAS HOSTED AT BFNA IN PARTNERSHIP WITH DEMOCRACY 2076 AROUND DESIGNING THE FUTURE OF OUR INSTITUTIONS. NEXT, FELLOWS WERE HOSTED AT NEW AMERICA FOR A LUNCH DISCUSSION ON LOCAL CIVIC LIFE IN THE U.S., WHICH ALSO HIGHLIGHTED BERTELSMANN FELLOW RICHARD YOUNG'S WORK IN LEXINGTON, KENTUCKY. FELLOWS ENGAGED WITH MARK SCHMITT, POLITICAL REFORM SENIOR DIRECTOR, AND HOLLIE RUSSON GILMAN, POLITICAL REFORM SENIOR FELLOW, AT NEW AMERICA. THE FINAL AFTERNOON SESSION WAS HELD AT AMERICAN ENTERPRISE INSTITUTE WHERE FELLOWS MET WITH PHILIP WALLACH, SENIOR FELLOW, AROUND BUILDING TRUST IN OUR INSTITUTIONS. THE DAY ENDED WITH A NETWORKING RECEPTION HOSTED BY BFNA IN HONOR OF THE CURRENT CLASS AND IN PARTNERSHIP WITH YOUNG PROFESSIONALS IN FOREIGN POLICY FOR THEIR FELLOWSHIP OF RISING EXPERTS. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) SESSION DAY 3, WASHINGTON, DC (JULY 24, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED ITS THIRD DAY OF SESSIONS IN DC. THE FIRST SESSION OF THE DAY WAS HOSTED AT BFNA WITH MIKE WARREN, SENIOR EDITOR OF THE DISPATCH, TO DISCUSS THE EVOLVING MEDIA LANDSCAPE IN THE UNITED STATES. FELLOWS THEN WENT TO THE COUNCIL OF FOREIGN RELATIONS TO MEET WITH KAT DUFFY, SENIOR FELLOW OF DIGITAL AND CYBERSPACE POLICY, TO DISCUSS THE FUTURE OF DIGITAL REGULATION IN THE UNITED STATES. IN THE AFTERNOON, FELLOWS MET WITH DEPUTY ASSISTANT ADMINISTRATOR CLAIRE EHMAN FROM USAID TO DISCUSS USAID'S NEW DEMOCRACY, HUMAN RIGHTS AND GOVERNANCE POLICY. THE LAST SESSION OF THE DAY WAS WITH MAX BERGER, SENIOR ADVISOR AT DEMREVIVAL, AND DREW VOLMERT, VP AND POLITICAL SCIENTIST AT FRAMEWORKS INSTITUTE, TO DISCUSS MINDSETS AND NARRATIVES AROUND DEMOCRACY. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) SESSION DAY 4, WASHINGTON, DC (JULY 25, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED ITS FOURTH AND FINAL DAY OF SESSIONS IN DC. A MORNING RANGE WORKSHOP WAS HOSTED BY TONY SILBERFELD TO ENGAGE THE FELLOWS WITH THE RANGE PLATFORM AND START THINKING ABOUT THE FUTURE OF DEMOCRACY. FELLOWS THEN HAD A SESSION AT THE WILSON CENTER WITH KELLE WICKER, DIRECTOR OF SCIENCE AND TECHNOLOGY INNOVATION PROGRAM, AND LIZ NEWBURY, DIRECTOR OF THE SERIOUS GAMES INITIATIVE, ON HOW THE USE OF DIGITAL GAMES CAN BRIDGE POLICY RESEARCH. FELLOWS SPENT THE AFTERNOON ON THE HILL ENGAGING WITH THE HOUSE AND SENATE. FELLOWS MET WITH HEATHER PAINTER, LEGISLATIVE DIRECTOR FOR DEREK KILMER, ON HOUSE MODERNIZATION EFFORTS AND WITH DYLAN IRLBECK, TECH POLICY FELLOW ON THE SENATE FINANCE COMMITTEE, ON DIGITIZATION OF GOVERNMENT SERVICES. THE DAY ENDED WITH A WRAP-UP DINNER AND REVIEW OF THE PROGRAM. BERTELSMANN FOUNDATION FELLOWSHIP (BFF) VIRTUAL SESSION 7 (SEPTEMBER 10, 2024): THE BERTELSMANN FOUNDATION FELLOWSHIP (BFF) CONVENED FOR ITS SEVENTH VIRTUAL SESSION. THIS SESSION PROVIDED FELLOWS AN OPPORTUNITY TO LEARN ABOUT THE USE OF LANGUAGE AND DEMOCRACY WORK. THE SESSION WAS LED BY EXTERNAL EXPERT SIRI ERICKSON, PROGRAM SUPPORT LEAD AT PACE. SHE COVERED THE LATEST</p>

Identifier	Return Reference	Explanation
		RESEARCH FROM PACE'S CIVIC PERCEPTIONS PROJECT AND PROVIDED A DETAILED OVERVIEW OF THE IMPORTANCE OF LANGUAGE IN COMMUNICATING AROUND DEMOCRACY. THE SECOND HALF OF THE SESSION WAS MODERATED BY FELLOW RICHARD YOUNG FOR Q&A WITH THE FELLOWS.BERTELSMANN FO
DIRECT CHARITABLE ACTIVITY (CONTINUED)	FORM 990-PF, PART VIII-A	<p>EU DIPLOMATS TOWN HALLSIN 2024, THE BERTELSMANN FOUNDATION CARRIED OUT TWO TOWN HALL EVENTS IN COLLABORATION WITH THE EU DELEGATION TO THE UNITED STATES. THE PURPOSE OF THE TOWN HALL TRIPS TO CHARLOTTE (AND RALEIGH), NORTH CAROLINA AND RICHMOND, VIRGINIA WAS TO GIVE EUROPEAN DIPLOMATS A STRONGER UNDERSTANDING OF THE AMERICAN POLITICAL, ECONOMIC AND CULTURAL ENVIRONMENT OUTSIDE OF WASHINGTON, DC. THE PARTICIPATING DIPLOMATS FROM VARIOUS EU MEMBER STATES, INCLUDING FRANCE, LITHUANIA, POLAND, BELGIUM, ITALY, GREECE, AUSTRIA, SLOVAKIA, LATVIA, PORTUGAL, SWEDEN, ESTONIA, CYPRUS, THE CZECH REPUBLIC AND THE EUROPEAN PARLIAMENT LIAISON OFFICE, MET WITH THE STATE LEGISLATORS, LOCAL NGOS, ACADEMIA, THE MEDIA AND ALSO PARTICIPATED IN PUBLIC EVENTS HOSTED BY LOCAL PARTNERS. ROUNDTABLE DISCUSSION ON THE EUROPEAN UNION, WILSON CENTER, WASHINGTON, DC (MARCH 6, 2024): THE BERTELSMANN FOUNDATION CO-HOSTED A PRIVATE ROUNDTABLE WITH THE GLOBAL EUROPE PROGRAM AT THE WOODROW WILSON INTERNATIONAL CENTER FOR SCHOLARS WITH DANIELA SCHWARZER, MEMBER OF THE EXECUTIVE BOARD OF THE BERTELSMANN STIFTUNG. THE DISCUSSION FOCUSED ON THE MANY CHALLENGES THE EUROPEAN UNION IS FACING, FROM SAFEGUARDING DEMOCRATIC VALUES AND FIGHTING DISINFORMATION TO INTEGRATING NEW MEMBER STATES AND BUILDING A ROBUST DEFENSE INDUSTRY AND WHETHER THE EU WILL REMAIN A RELIABLE PARTNER IN THE FUTURE. DANIELA SCHWARZER, A LEADING EXPERT ON EUROPEAN AND INTERNATIONAL AFFAIRS, KICKED-OFF THE DISCUSSION WITH AN OVERVIEW ON HOW THE EU SHOULD CHANGE TO MEET THESE CHALLENGES. THE EVENT WAS ATTENDED BY REPRESENTATIVES FROM THE U.S. GOVERNMENT, EU EMBASSIES, ACADEMIA, AND THINK THANKS.VIRGINIA TOWN HALL WITH EU DELEGATION, RICHMOND, VA (MARCH 7, 2024): IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO RICHMOND, VIRGINIA, WITH DANIELA SCHWARZER, MEMBER OF THE EXECUTIVE BOARD OF THE BERTELSMANN STIFTUNG AS WELL AS REPRESENTATIVES FROM THE EMBASSIES OF BELGIUM, FRANCE, AUSTRIA, SLOVAKIA, AND THE EUROPEAN UNION. TOGETHER, THE DELEGATION MET WITH DEMOCRATIC AND REPUBLICAN MEMBERS OF THE GENERAL ASSEMBLY, NON-PROFIT ORGANIZATIONS FOCUSED ON CIVIC ENGAGEMENT, AND JEFF SHAPIRO, A VIRGINIA POLITICAL COMMENTATOR. THE PURPOSE OF THE TRIP WAS TO ENHANCE THE GROUP'S UNDERSTANDING OF THE STATE OF POLITICAL AFFAIRS IN VIRGINIA. THE TRIP ALLOWED BFNA TO CREATE NEW CONNECTIONS WITH EMBASSY STAFF, NON-PROFIT ORGANIZATIONS, AND GENERAL ASSEMBLY MEMBERS. EUROPEAN PARLIAMENT ELECTIONS ROUNDTABLE, AMERICAN UNIVERSITY, WASHINGTON, DC (APRIL 23, 2024): SARA LEMING, RESEARCH ANALYST, WAS A PANELIST WITH RYAN MELIAK, HEAD OF OUTREACH, EUROPEAN PARLIAMENT LIAISON OFFICE, AMERICAN UNIVERSITY. THE EVENT STARTED WITH A VIDEO, CREATED BY THE BERTELSMANN FOUNDATION, ON THE UPCOMING EP ELECTION. PANELISTS DISCUSSED WHAT IS MOTIVATING EUROPEAN VOTERS IN BELGIUM, ITALY, ESTONIA, THE NETHERLANDS IN GREECE. THE SPEAKERS ALSO BRIEFED STUDENTS ON HOW THE ELECTIONS ARE RUN AND WHAT TO EXPECT BASED OFF CURRENT POLLING DATA. THE DISCUSSION WAS FOLLOWED BY AN INTERACTIVE Q&A WITH STUDENTS. EUROPEAN PARLIAMENT ELECTIONS ROUNDTABLE, BERTELSMANN FOUNDATION, WASHINGTON, DC (MAY 7, 2024): THE BERTELSMANN FOUNDATION HOSTED A ROUNDTABLE EVENT ON THE UPCOMING EUROPEAN PARLIAMENT ELECTIONS. MR. WALTER GOETZ, DIRECTOR OF THE EUROPEAN PARLIAMENT LIAISON OFFICE IN WASHINGTON DC, PROVIDED WELCOME REMARKS, AND MR. CHRISTIAN MANGOLD, DIRECTOR GENERAL FOR INTERNAL POLICIES OF THE UNION IN THE EUROPEAN PARLIAMENT, SERVED AS THE EVENT'S KEYNOTE SPEAKER. MR. MANGOLD ANALYZED THE CURRENT POLLING PREDICTIONS OF THE EP ELECTIONS, VOTER TURNOUT, AND WHAT TO EXPECT FOLLOWING THE ELECTION. AFTER THE KEYNOTE, SARA LEMING, RESEARCH ANALYST, MODERATED AN INTERACTIVE Q&A WITH THE ATTENDEES, AND PREMIERED BFNA'S NEW ANIMATION ON WHY THE EP ELECTION IS RELEVANT TO AMERICANS AND THE FUTURE OF THE TRANSATLANTIC RELATIONSHIP. THE EVENT CONCLUDED WITH A NETWORKING RECEPTION.EUROPEAN PARLIAMENT ELECTIONS BRIEFING, CAPITOL HILL, WASHINGTON, DC (JUNE 14, 2024): THE BERTELSMANN FOUNDATION PARTNERED WITH THE EUROPEAN PARLIAMENT LIAISON OFFICE (EPLI) IN WASHINGTON, DC, TO ORGANIZE A BRIEFING ON THE EUROPEAN PARLIAMENT ELECTIONS. THE EVENT WAS HELD ON CAPITOL HILL AND WAS HOSTED BY REPRESENTATIVE BOYLE (DEMOCRATIC PARTY) AND REPRESENTATIVE WILSON (REPUBLICAN PARTY). OVER 30 STAFFERS FROM BOTH THE DEMOCRATIC AND REPUBLICAN PARTIES ATTENDED THE BRIEFING. THE EVENT OPENED WITH THE BERTELSMANN FOUNDATION'S ANIMATED EXPLAINER, "HOW THE EUROPEAN PARLIAMENT ELECTION IS RELEVANT TO THE UNITED STATES". WALTER GOETZ (PRESIDENT OF EPLI) AND IRENE BRAAM (BERTELSMANN FOUNDATION EXECUTIVE DIRECTOR) PROVIDED REMARKS ON THE ELECTION RESULTS AND THEN OPENED THE FLOOR FOR Q&A. THE EVENT PROVIDED CONGRESSIONAL STAFFERS WITH A STRONG UNDERSTANDING OF THE RECENT EUROPEAN PARLIAMENT ELECTION AND THE WORK OF THE BERTELSMANN FOUNDATION.EU DELEGATION VISIT, NORTH CAROLINA (OCTOBER 9-10, 2024): IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO RALEIGH AND CHARLOTTE, NORTH CAROLINA, WITH THE EU DELEGATION AND THIRTEEN MEMBER STATES INCLUDING AUSTRIA, BELGIUM, CYPRUS, CZECH REPUBLIC, DENMARK, ESTONIA, ITALY, LATVIA, LITHUANIA, POLAND, PORTUGAL, SLOVAKIA, AND SWEDEN. THE VISIT BEGAN IN RALEIGH, NORTH CAROLINA, WHERE THE GROUP MET WITH GOVERNOR COOPER'S TEAM AT THE EXECUTIVE MANSION, VISITED CBS-17 TO TOUR THE NEWS ROOM, AND ATTENDED A BRIEFING BY THE NC STATE POLITICAL DEPARTMENT ON NORTH CAROLINA POLITICS. THE DELEGATION ENDED THE FIRST DAY IN CHAPEL HILL WITH THE UNC HUSSMANN SCHOOL OF JOURNALISM AND THE TRANSATLANTIC MASTER'S PROGRAM. ON THE SECOND DAY, THE DELEGATION MET WITH LOCAL CITY OFFICIALS IN CHARLOTTE AND NORTH CAROLINA AND POLITICAL REPRESENTATIVES FROM BOTH THE REPUBLICAN AND DEMOCRATIC PARTY'S. THE DELEGATION WAS ALSO HOSTED FOR A LUNCH EVENT WITH THE WORLD AFFAIRS COUNCIL OF CHARLOTTE. THE TRIP WAS AN EXCELLENT OPPORTUNITY FOR THE BERTELSMANN FOUNDATION TO ESTABLISH NEW CONNECTIONS IN NORTH CAROLINA AND WITH EU MEMBER STATE DIPLOMATS BASED IN WASHINGTON, DC.GERMAN EMBASSY TOWN HALLSIN 2024, THE BERTELSMANN FOUNDATION CARRIED OUT TWO TOWN HALL PROJECTS WITH THE GERMAN EMBASSY. THE PURPOSE OF THE PROJECT WAS TO GIVE GERMAN DIPLOMATS A STRONGER UNDERSTANDING OF THE AMERICAN POLITICAL, ECONOMIC AND CULTURAL ENVIRONMENT OUTSIDE OF WASHINGTON, DC AND AMERICA'S CLIMATE POLICY. IN ADDITION, THE VISITS ALLOWED BOTH THE GERMAN EMBASSY AND THE</p>

Identifier	Return Reference	Explanation
		<p>BERTELSMANN FOUNDATION TO CONNECT WITH VARIOUS COMMUNITY STAKEHOLDERS AND EXPAND THEIR RESPECTIVE NETWORKS. DURING THE TRIPS, THE DELEGATION HELD BILATERAL MEETINGS AND PUBLIC EVENTS WITH A DIVERSE RANGE OF NGOS, ELECTED OFFICIALS, MEDIA, ACADEMIA AND AMERICAN CITIZENS. TOGETHER THESE GROUPS PROVIDED A WELL-ROUNDED PERSPECTIVE AND AN IN-DEPTH UNDERSTANDING OF THE ISSUES SHAPING THE MINDS OF THE AMERICAN PUBLIC. IN 2024, THE DELEGATION TRAVELED TO NINE STATES ON SIX SEPARATE TRIPS. LOCATIONS INCLUDED DENVER, COLORADO; ST. PAUL, MINNESOTA; BATON ROUGE, LOUISIANA; CHARLESTON, WEST VIRGINIA; PORTLAND, MAINE; BURLINGTON, VERMONT; COVINGTON, KENTUCKY; COLUMBUS, OHIO AND CARMEL, INDIANA. GERMAN EMBASSY TOWN HALLS, COLORADO (APRIL 8-11, 2024): IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO DENVER, BOULDER, AND COLORADO SPRINGS, COLORADO, WITH MR. MARKUS TEGLAS, POLITICAL COUNSELOR, GERMAN EMBASSY, WASHINGTON DC. THE PURPOSE OF THE TRIP WAS TO ENHANCE MR. TEGLAS' UNDERSTANDING OF THE STATE OF ECONOMIC AND POLITICAL AFFAIRS IN THE COLORADO REGION OF THE UNITED STATES. THE TOWN HALL KICKED OFF IN BOULDER, COLORADO, WITH A DINNER MEETING WITH MAYOR AARON BROCKETT. ON THE SECOND DAY, THE DELEGATION MET WITH LEGISLATORS FROM BOTH THE REPUBLICAN AND DEMOCRATIC PARTIES, CIVIC ENGAGEMENT LEADERS, AND LATINO COMMUNITY LEADERS. THE GROUP ALSO TOOK PART IN PUBLIC EVENTS WITH WORLD DENVER AND DENVER UNIVERSITY'S JOSEF KORBEL SCHOOL OF INTERNATIONAL STUDIES. THE FOLLOWING DAY, THE GROUP VISITED COLORADO SPRINGS AND MET WITH MAYOR YEMI MOBOLADE, LOCAL POLITICAL GROUPS, AND THE WORLD AFFAIRS COUNCIL. MAIN TOPICS OF DISCUSSION INCLUDED HOUSING AFFORDABILITY, ENVIRONMENTAL CHALLENGES, AND THE GROWING INFLUENCE OF THE LATINO COMMUNITY. THE TRIP ALLOWED BFNA TO CREATE NEW CONNECTIONS AND LEARN ABOUT THE ONGOING CHALLENGES IN COLORADO AND THE ROCKY MOUNTAIN REGION OF THE UNITED STATES. GERMAN EMBASSY CLIMATE TOWN HALLS, LOUISIANA (JUNE 6-7, 2024): IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO NEW ORLEANS AND BATON ROUGE, LOUISIANA, WITH SOPHIE HEMMER, CLIMATE COUNSELOR AT THE GERMAN EMBASSY IN WASHINGTON, DC. THE PURPOSE OF THE TRIP WAS TO ENHANCE MS. HEMMER'S UNDERSTANDING OF THE STATE OF THE ENVIRONMENT AND NATURAL RESOURCES IN THE DEEP SOUTH REGION OF THE UNITED STATES. THE TOWN HALL KICKED-OFF IN NEW ORLEANS AND INCLUDED MEETINGS WITH MAYOR CANTRELL, THE SIERRA CLUB, TULANE ENVIRONMENTAL LAW CLINIC, THE AFFORDABLE ALLIANCE FOR ENERGY, AND A PUBLIC EVENT ON COASTAL FLOODING WITH THE NATURE CONSERVANCY. ON THE SECOND DAY, THE DELEGATION TRAVELED TO BATON ROUGE TO MEET WITH STATE LEGISLATORS FROM THE ENVIRONMENTAL & NATURAL RESOURCES COMMITTEE, THE LOUISIANA DEPARTMENT FOR ENVIRONMENTAL EQUALITY, AND DAVANTE LEWIS, PUBLIC COMMISSIONER FOR THE STATE OF LOUISIANA. THE DELEGATION ALSO MET WITH THE REPUBLICAN WOMEN'S CLUB OF BATON ROUGE TO DISCUSS ENVIRONMENTAL SUSTAINABILITY AND THE STATE OF POLITICS. THE TRIP ALLOWED BFNA TO CREATE NEW CONNECTIONS AND LEARN ABOUT ONGOING CHALLENGES IN LOUISIANA AND THE DEEP SOUTH REGION OF THE UNITED STATES. GERMAN EMBASSY TOWN HALLS, MINNESOTA (JUNE 11-12, 2024): IRENE BRAAM, EXECUTIVE DIRECTOR, AND SARA LEMING, RESEARCH ANALYST, TRAVELED TO THE CITIES OF MINNEAPOLIS, ST. PAUL, AND ROCHESTER, MINNESOTA WITH RAINER BREUL, HEAD OF THE POLITICAL AFFAIRS SECTION AT THE GERM</p>
DIRECT CHARITABLE ACTIVITY (CONTINUED)	FORM 990-PF, PART VIII-A	<p>SUMMER ENRICHMENT SERIES, PART 1: BILATERAL RELATIONSHIPS GERMANY & FRANCE, BERTELSMANN FOUNDATION, WASHINGTON, DC (JUNE 26, 2024): 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. PASCAL CONFAVREUX, SPOKESPERSON FOR THE FRENCH EMBASSY, AND MARKUS TEGLAS, MINISTER COUNSELOR OF POLITICAL AFFAIRS AT THE GERMAN EMBASSY, SERVED AS GUEST SPEAKERS. THE EVENT BEGAN WITH A SHORT PRESENTATION OF THE TRANSATLANTIC BAROMETER BY COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS. FOLLOWING THE BAROMETER PRESENTATION, MR. CONFAVREUX SPOKE FROM A FRENCH PERSPECTIVE AND MR. TEGLAS PROVIDED A GERMAN PERSPECTIVE ON THE HISTORICAL ROOTS OF THE FRENCH-GERMAN RELATIONSHIP, AS LEADERS OF THE EU, AND ON THE COMMON CHALLENGES CURRENTLY FACED BY BOTH COUNTRIES. SUMMER ENRICHMENT SERIES, NETWORKING & CAREER PANEL, BERTELSMANN FOUNDATION, WASHINGTON, DC (JULY 12, 2024): THE BERTELSMANN FOUNDATION HOSTED YOUNG PROFESSIONALS AND FIVE GUEST SPEAKERS AS PART OF A TRANSATLANTIC CAREER PANEL FOR THE SUMMER ENRICHMENT SERIES. CAREER PANELISTS INCLUDED CHLOE LADD, MANAGER OF TRANSATLANTIC RELATIONS AT THE BERTELSMANN FOUNDATION, MASA OCVRIK, PROGRAM COORDINATOR FOR THE GLOBAL EUROPE PROGRAM AT THE WOODROW WILSON INTERNATIONAL CENTER FOR SCHOLARS, SOPHIE RASMUSSEN, PUBLIC DIPLOMACY ADVISOR AT THE EMBASSY OF DENMARK, PABLO RASMUSSEN, SPECIAL ASSISTANT TO THE DIRECTOR OF PEACE CORPS, AND NOAH DEMICHELE, ASSOCIATE AT DENTONS GLOBAL ADVISORS - ALBRIGHT STONEBRIDGE GROUP'S EUROPE PRACTICE. EACH PANELIST SHARED INFORMATION ABOUT THEIR CAREER PATHS AND OFFERED ADVICE TO THE ASPIRING GRADUATE STUDENTS SEEKING TO ENTER THE TRANSATLANTIC ARENA POST-GRADUATION. SUMMER ENRICHMENT SERIES, PART 2: TRANSATLANTIC COOPERATION TOWARDS THE ENVIRONMENT, BERTELSMANN FOUNDATION, WASHINGTON, DC (JULY 17, 2024): THE BERTELSMANN FOUNDATION HOSTED A GROUP OF YOUNG PROFESSIONALS AND TWO GUEST SPEAKERS FOR PART TWO OF THE SUMMER ENRICHMENT SERIES. THE THEMATIC FOCUS OF THE EVENT WAS CLIMATE CHANGE AND HOW THE U.S. AND EUROPEAN UNION ARE WORKING TOGETHER TO COMBAT IT. MR. MILO MCBRIDE, FELLOW, SUSTAINABILITY, CLIMATE AND GEOPOLITICS PROGRAM AT CARNEGIE ENDOWMENT FOR INTERNATIONAL PEACE, AND MS. SOPHIE HEMMER, CLIMATE COUNSELOR AT THE GERMAN EMBASSY IN WASHINGTON, DC, SERVED AS GUEST SPEAKERS. THE EVENT BEGAN WITH A SHORT PRESENTATION OF BFNA'S RANGE PLATFORM BY MARSHALL REID, SENIOR MANAGER OF US-EU-ASIA DYNAMICS. FOLLOWING THE RANGE PRESENTATION, THE TWO SPEAKERS PROVIDED A KEY NOTE ADDRESS, FOLLOWED BY Q&A WITH THE PARTICIPANTS. SUMMER ENRICHMENT SERIES, PART 3: THE FUTURE OF TRANSATLANTIC DEFENSE, BERTELSMANN FOUNDATION, WASHINGTON, DC (JULY 31, 2024): THE BERTELSMANN FOUNDATION HOSTED A GROUP OF YOUNG PROFESSIONALS AND THREE GUEST SPEAKERS FOR THE LAST MEETING OF THE SUMMER ENRICHMENT SERIES. THE THEMATIC FOCUS OF THE EVENT WAS THE FUTURE OF TRANSATLANTIC DEFENSE FEATURING SPACE POLICY. OUR THREE GUEST SPEAKERS WERE MR. TONY SILBERFELD, DIRECTOR OF TRANSATLANTIC RELATIONS AT THE BERTELSMANN FOUNDATION, MR. DICK BUENNEKE, SENIOR ADVISOR</p>

Identifier	Return Reference	Explanation
		<p>FOR NATIONAL SECURITY SPACE POLICY IN THE BUREAU OF ARMS CONTROL, AND REAR ADMIRAL HENNING FALTON, MILITARY ADVISOR AT THE EUROPEAN EXTERNAL ACTION SERVICE. THE EVENT BEGAN WITH A SHORT PRESENTATION OF THE TRANSATLANTIC PERISCOPE BY LAUREN LETIZIA, TRANSATLANTIC PROJECTS FELLOW AT THE BERTELSMANN FOUNDATION. FOLLOWING THE TRANSATLANTIC PERISCOPE PRESENTATION, THE THREE SPEAKERS PROVIDED REMARKS TO THE GROUP AND THEN THE PARTICIPANTS HAD THE OPPORTUNITY TO ASK THE SPEAKERS QUESTIONS. THE TRUST PROJECTS PART OF THE BERTELSMANN FOUNDATION'S WORK IN HOSTING THE WASHINGTON, DC REINHARD MOHN PRIZE ROUNDTABLE, WE SELECTED ONE OF THE INNOVATIONS FEATURED IN OUR DISCUSSIONS TO TRANSFORM INTO AN EXPLANATORY ANIMATION THAT WOULD BE A USEFUL EDUCATIONAL TOOL, LONG AFTER THE PROJECT ENDED. WITH THAT IN MIND, THE FOUNDATION PARTNERED WITH THE TRUST PROJECT, A NON-PROFIT ORGANIZATION FOCUSED ON LABELING DISINFORMATION, TO CREATE A VIDEO HIGHLIGHTING THE EIGHT TRUST INDICATORS FOR A HEALTHY MEDIA ENVIRONMENT. BY FOLLOWING EACH OF THE INDICATORS, THE PUBLIC WOULD BE EQUIPPED TO IDENTIFY WHETHER WHAT THEY READ IS FACTUAL OR A PIECE OF DISINFORMATION. THE TRUST PROJECT PARTNERS WITH MORE THAN 300 MEDIA OUTLETS AROUND THE WORLD WHO WILL FEATURE THIS EDUCATIONAL VIDEO ON THEIR RESPECTIVE WEBSITES, SO CITIZENS WILL BE BETTER INFORMED AND ABLE TO SEPARATE FACT FROM FICTION. TRANSATLANTIC BAROMETER THE TRANSATLANTIC BAROMETER IS AN ONLINE PLATFORM, LAUNCHED BY THE BERTELSMANN FOUNDATION IN 2022, WHICH PROVIDES TRANSPARENT AND CREDIBLE POLICY OVERVIEWS, VISUAL REPRESENTATIONS, AND EXPERT INSIGHT ON PRESSING TRANSATLANTIC CHALLENGES FOR 30 COUNTRIES AND THE EUROPEAN UNION. FOUR NEW TOPICS WERE ADDED TO THE TRANSATLANTIC BAROMETER IN 2024: MIGRATION, ELECTIONS AND VOTER TURNOUT, FOREIGN DIRECT INVESTMENT, AND E-GOVERNANCE. THE TOTAL NUMBER OF TOPICS FEATURED ON THE TRANSATLANTIC BAROMETER IS NOW 17. IN ADDITION TO THE WRITTEN CONTENT, FOUR EXPERT INTERVIEWS WERE UPLOADED TO THE SITE IN 2024, FEATURING KEY DECISIONMAKERS FROM THE UNITED STATES, GERMANY, AND ESTONIA. TEN ADDITIONAL INFOGRAPHICS ACCOMPANIED THE TOPICS IN 2024, AND TWO NEW INFOGRAPHIC MODULES WERE LAUNCHED: TREE MAPS AND CHOROPLETH MAPS. FRANCO-GERMAN ROUNDTABLE, BERTELSMANN FOUNDATION, WASHINGTON, DC (JUNE 25, 2024): THE BERTELSMANN FOUNDATION HOSTED A ROUNDTABLE ON FRANCO-GERMAN APPROACHES TO DEMOCRACY AND ELECTIONS. COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS AND CHLOE LADD, MANAGER OF TRANSATLANTIC RELATIONS, ORGANIZED AND MODERATED THE EVENT, TONY SILBERFELD, DIRECTOR OF TRANSATLANTIC RELATIONS, GAVE OPENING INTRODUCTIONS, AND EXTERNAL GUESTS PASCAL CONFAVREUX FROM THE FRENCH EMBASSY AND RAINER BREUL FROM THE GERMAN EMBASSY GAVE REMARKS. TOPICS COVERED INCLUDED THE EUROPEAN ELECTION RESULTS, EFFORTS TO FIGHT MISINFORMATION AND DISINFORMATION, AND VOTER TURNOUT. TRANSATLANTIC FORESIGHT LAB (RANGE) THE BERTELSMANN FOUNDATION, IN PARTNERSHIP WITH THE BERTELSMANN STIFTUNG, CONTINUED ITS JOINT WORK IN THE TRANSATLANTIC FORESIGHT LAB IN 2024. THIS PROJECT HAS TWO DISTINCT, BUT RELATED, ELEMENTS: TO IDENTIFY FUTURE CHALLENGES IN THE EURO-AMERICAN POLICY AGENDA AND TO PRESCRIBE PROACTIVE SOLUTIONS TO ADDRESS THE COMING CHALLENGES. THE FIRST ELEMENT IS RANGE (REASSESSING ASSUMPTIONS IN A NEW GEOSTRATEGIC ENVIRONMENT), AN ONLINE PLATFORM THAT CREATES A CROWD-SOURCED FORECASTING FUNCTION TO PREDICT WHAT LIES AHEAD. THIS YEAR THE PROJECT SCALED UP ITS ACTIVE USER BASE OF FORECASTERS TO OVER 1100. THIS RESULTED IN SEVERAL THOUSAND FORECASTS THAT SERVE AS BENCHMARKS AND DATA POINTS FOR THE OFFICIAL POLICYMAKING PROCESSES IN BRUSSELS AND WASHINGTON. THE FORECASTING WORK ONLINE WAS EXPANDED THIS YEAR TO IN-PERSON WORKSHOPS WITH MINISTRIES OF FOREIGN AFFAIRS IN MADRID, BERLIN AND ATHENS, AND STUDENT TRAINING SESSIONS IN UNIVERSITIES IN THE US AND EU. THE SECOND ELEMENT, THE TRANSATLANTIC EXPERT WORKING GROUP, MET IN BRUSSELS AND BERLIN IN 2024 TO CONTINUE DRAFTING PAPERS FOR A FINAL REPORT LOOKING AT TRANSATLANTIC GUARDRAILS AHEAD OF THE 2024 US AND EU ELECTIONS. IN ADDITION TO THE GROUP DISCUSSIONS, EXPERTS ATTENDED A FULL PROGRAM OF BILATERAL MEETINGS AT THE GERMAN FOREIGN OFFICE AND WITH OFFICIALS IN THE EU COMMISSION. TRANSATLANTIC BRIDGE CONFERENCE, INSTITUTO EMPRESAS, MADRID, SPAIN (MARCH 12, 2024): IE UNIVERSITY, YALE UNIVERSITY, SCIENCE PO, AND JOHNSON HOPKINS HOSTED THE TRANSATLANTIC BRIDGE CONFERENCE AT THE IE CAMPUS IN MADRID. THE BERTELSMANN FOUNDATION WAS ALSO A FINANCIAL CO-SPONSOR OF THE EVENT. THE FULL DAY OF SESSIONS WAS LED BY BFNA'S TONY SILBERFELD, ALONG WITH ADAM SIEGEL OF CULTIVATE LABS, BUILT AROUND THE RANGE FORECASTING PLATFORM. THE ASSEMBLED GROUP OF 30 TRANSATLANTIC EXPERTS COMPLETED THE FULL LIFE CYCLE OF SCENARIO PLANNING THROUGH DECOMPOSITION ON A VARIETY OF GEOPOLITICAL TOPICS. THIS GATHERING WILL RESULT IN FOUR POLICY BRIEFS AND FORECASTING QUESTIONS THAT WILL BE FEATURED DURING THE SECOND LEG OF THE CONFERENCE, WHICH WILL BE HELD IN BOLOGNA, JUNE 2024. RANGE PRESENTATION, SPANISH MINISTRY OF FOREIGN AFFAIRS, MADRID, SPAIN (MARCH 14, 2024): THE BERTELSMANN FOUNDATION PRESENTED ITS CROWD SOURCED FORECASTING PLATFORM, RANGE, AT A MEETING OF THE FORESIGHT UNIT IN THE SPANISH MINISTRY OF FOREIGN AFFAIRS. LED BY BFNA'S TONY SILBERFELD, ALONGSIDE ALVARO IMBERNN, DIRECTOR OF FORESIGHT AT THE MINISTRY, THE PRESENTATION AND SUBSEQUENT DISCUSSION EXPLORED WAYS IN WHICH THE RANGE CROWD CAN BE USED AS A BENCHMARKING TOOL FOR THE MINISTRY'S OWN FORECASTING CAPABILITY. THE GROUP WILL MEET AGAIN IN THE COMING WEEKS TO DISCUSS SPECIFIC QUESTIONS TO BE INCLUDED ON THE PLATFORM, AND COMMITTED TO PARTICIPATING IN THE BERTELSMANN FORESIGHT CONFERENCE IN MAY. INTERACTIVE RANGE SESSION, UNIVERSIDAD DE MADRID COMPLUTENSE, MADRID, SPAIN (MARCH 14, 2024): THE BERTELSMANN FOUNDATION FACILITATED A RANGE INTERACTIVE FORECASTING AND TRAINING SESSION WITH EU FOREIGN POLICY AND TRANSATLANTIC STUDENTS AT THE UNIVERSIDAD DE MADRID COMPLUTENSE (UCM). DURING THE TWO-HOUR SESSION, BFNA'S TONY SILBERFELD LED STUDENTS THROUGH THE HISTORY AND METHODOLOGY OF CROWD-SOURCED FORECASTING, BEFORE LAUNCHING INTO A LIVE FORECASTING SESSION ON THE OUTCOME OF THE U.S. GENERAL ELECTION. IN ADDITION TO MAKING LIVE FORECASTS, STUDENTS WERE PRESSED TO DEFEND THEIR PREDICTIONS AND CONSIDER VARIABLES THAT WOULD CHANGE THEIR ASSESSMENTS. INTERACTIVE RANGE SESSION, INSTITUTE EMPRESAS UNIVERSITY, MADRID, SPAIN (MARCH 14, 2024): THE BERTELSMANN FOUNDATION FACILITATED A RANGE INTERACTIVE FORECASTING AND TRAINING SESSION WITH EU FOREIG</p>
DIRECT	FORM 990-	UNITED KINGDOM PERISCOPE LAUNCH, BRITISH HOUSE OF PARLIAMENT, LONDON, UK (MAY 14, 2024): THE

Identifier	Return Reference	Explanation
CHARITABLE ACTIVITY (CONTINUED)	PF, PART VIII-A	<p>BERTELSMANN FOUNDATION AND THE FOREIGN POLICY CENTRE LAUNCHED THE TRANSATLANTIC PERISCOPE'S US-UK MODULE AT AN EVENT IN THE BRITISH HOUSE OF PARLIAMENT. AN INTRODUCTION TO THE PERISCOPE WAS FOLLOWED BY A PANEL DISCUSSION ON THE STATE OF US-UK RELATIONS AS WE APPROACH ELECTIONS IN BOTH COUNTRIES THIS AUTUMN. THE DISCUSSION, MODERATED BY HOUSE OF LORDS PEER BARONESS NORTHOVER, FEATURED TONY SILBERFELD FROM THE BERTELSMANN FOUNDATION, PRESHANT RAO OF SEMAFOR, LOIS TOOLE FROM THE COALITION FOR GLOBAL PROSPERITY, AND THOMAS EASON OF ASTON UNIVERSITY. THE EVENT CONCLUDED WITH AN EXTENDED Q&A WITH THE AUDIENCE.</p> <p>2024 TRANSATLANTIC PERISCOPE SUMMIT, BRUSSELS, BELGIUM (MAY 16, 2024): THE BERTELSMANN FOUNDATION AND EGMONT INSTITUTE CO-HOSTED THE SECOND ANNUAL TRANSATLANTIC PERISCOPE SUMMIT IN BRUSSELS, BELGIUM. CURATION FROM ACROSS THE EUROPEAN UNION AND UK GATHERED FOR A FULL-DAY PROGRAM TO DISCUSS THE CURRENT STATE OF THE PERISCOPE AND PLANS FOR THE PLATFORM GOING FORWARD. IN ADDITION TO THE DISCUSSIONS OF THE TECHNICAL AND OUTREACH ASPECTS OF THE PROJECT, PARTNERS PROVIDED DETAILED BRIEFINGS ON THE UPCOMING EU ELECTIONS AND WERE BRIEFED ON THE STATE OF TRANSATLANTIC RELATIONS BY STEVEN EVERTS, EXECUTIVE DIRECTOR OF THE EUROPEAN UNION INSTITUTE FOR SECURITY STUDIES.</p> <p>TRANSATLANTIC PERISCOPE WEBINAR: CENTRE FOR LIBERAL STRATEGIES BRIEFING ON THE AFTERMATH OF THE BULGARIAN NATIONAL ELECTIONS (JULY 24, 2024): THE BERTELSMANN FOUNDATION HOSTED AN INTERNAL WEBINAR FOR CURATORS OF THE TRANSATLANTIC PERISCOPE PROJECT. THE BRIEFING WAS MODERATED BY SARA LEMING, RESEARCH ANALYST, AND WAS LED BY ANNA GANEVA AND KALOYAN VALCHEV FROM THE CENTRE FOR LIBERAL STRATEGIES. BOTH COLLEAGUES PROVIDED AN INFORMATIVE PRESENTATION ON THE PRIORITIES OF THE ELECTION AND EXPLAINED THE OUTCOMES OF EACH MAJOR POLITICAL PARTY. THE PRESENTATION WAS FOLLOWED BY A Q&A DISCUSSION. THE WEBINAR WAS ATTENDED BY PERISCOPE PARTNERS IN GREECE, POLAND, CYPRUS, CROATIA, GERMANY, BELGIUM, AND THE UNITED KINGDOM.</p> <p>PERISCOPE PARTNER BRIEFING: PROJECT 2025 (WEBINAR) (SEPTEMBER 18, 2024): THE BERTELSMANN FOUNDATION HOSTED AN ONLINE WEBINAR TO BRIEF TRANSATLANTIC PERISCOPE PARTNERS ON THE HERITAGE FOUNDATION'S PROJECT 2025, AND ITS IMPACT ON THE US ELECTIONS. THE SESSION WAS MODERATED BY BFNA'S TONY SILBERFELD AND FEATURED A PRESENTATION FROM BRANDON BOHRN FROM THE BERTELSMANN STIFTUNG. FOLLOWING THE PRESENTATION, THE AUDIENCE OF 15 COLLEAGUES FROM PERISCOPE PARTNER ORGANIZATIONS ACROSS EUROPE PARTICIPATED IN A Q&A SESSION.</p> <p>TRANSATLANTIC PERISCOPE: U.S. ELECTION POST-MORTEM (VIRTUAL) (NOVEMBER 11, 2024): THE BERTELSMANN FOUNDATION HOSTED A WEBINAR WITH FOR THE TRANSATLANTIC PERISCOPE PARTNER NETWORK TO PROVIDE INSIGHTS AND ANALYSIS ON THE RESULTS ON THE U.S. ELECTIONS. THE ONLINE EVENT KICKED OFF WITH BFNA'S TONY SILBERFELD WHO PROVIDED A PRESENTATION OF THE RESULTS AT THE NATIONAL, STATE AND LOCAL LEVELS AND AN ANALYSIS OF WHAT'S TO COME. SCOTT LUCAS FROM THE CLINTON INSTITUTE AT THE UNIVERSITY COLLEGE DUBLIN FOLLOWED WITH AN EXAMINATION OF THE PROSPECTS FOR TRANSATLANTIC COOPERATION UNDER A NEW TRUMP ADMINISTRATION. THE EVENT CONCLUDED WITH AN OPEN Q&A WITH THE AUDIENCE, WHICH COVERED A RANGE OF TOPICS INCLUDING ECONOMIC POLICY, RELATIONS WITH CHINA, AND THE FUTURE OF THE MIDDLE EAST.</p> <p>TRANSATLANTIC PERISCOPE LAUNCH: U.S.-SWEDEN MODULE, STOCKHOLM, SWEDEN (NOVEMBER 14, 2024): THE BERTELSMANN FOUNDATION AND THE STOCKHOLM FREE WORLD FORUM (SFWF) CO-HOSTED AN EVENT TO LAUNCH THE U.S.-SWEDEN MODULE OF THE TRANSATLANTIC PERISCOPE. THE ROUNDTABLE, MODERATED BY SFWF EXECUTIVE DIRECTOR ANNA RENNUS GUTHRIE, KICKED OFF WITH A PRESENTATION BY BFNA'S TONY SILBERFELD ON THE PURPOSE AND FUNCTIONS OF THE TRANSATLANTIC PERISCOPE. THE PRESENTATION WAS FOLLOWED BY A PANEL DISCUSSION ON THE FUTURE OF THE U.S.-SWEDEN RELATIONS IN THE AFTERMATH OF THE U.S. ELECTIONS ALSO FEATURING SFWF SENIOR FELLOW PATRIK OKSANEN AND THE WILSON CENTER'S JASON MOYER. FOLLOWING THE PANEL DISCUSSION, THE AUDIENCE ENGAGED ONLINE AND IN PERSON IN A LIVELY Q&A ON THE FUTURE OF NATO, THE COMPOSITION OF THE TRUMP NATIONAL SECURITY TEAM, AND THE PROSPECTS FOR ECONOMIC COOPERATION BETWEEN THE U.S. AND SWEDEN.</p> <p>TRANSATLANTIC PERISCOPE LAUNCH: U.S.-HUNGARY MODULE, BUDAPEST, HUNGARY (DECEMBER 11, 2024): THE BERTELSMANN FOUNDATION AND POLITICAL CAPITAL CO-HOSTED A LAUNCH EVENT FOR THE U.S.-HUNGARY MODULE OF THE TRANSATLANTIC PERISCOPE IN BUDAPEST. THE EVENT COMMENCED WITH AN INTRODUCTION TO THE PERISCOPE PROJECT BY POLITICAL CAPITAL'S PRESIDENT PETER KREKO AND THE BERTELSMANN FOUNDATION'S TONY SILBERFELD. THE PROCEEDINGS THEN SHIFTED TO A ROUNDTABLE DISCUSSION INCLUDING DIPLOMATS, JOURNALISTS, AND PRACTITIONERS FROM THE NGO COMMUNITY FOR A CONVERSATION ON THE IMPLICATIONS OF THE AMERICAN ELECTIONS ON THE FUTURE OF U.S.-HUNGARY RELATIONS. THE DISCUSSION WAS LED BY KREKO AND SILBERFELD AND WAS FOLLOWED BY A LIVELY Q&A SESSION WITH THE ATTENDEES.</p> <p>U.S. ELECTION SERIES IN 2024, THE BERTELSMANN FOUNDATION CREATED A SERIES OF EXPLANATORY AND ANALYTICAL CONTENT TO HELP EXPLAIN THE US ELECTIONS TO AN AUDIENCE IN THE US, EUROPE AND BEYOND, MADE AVAILABLE AT OUR ONLINE ELECTION HUB. RECOGNIZING THE IMMENSE IMPORTANCE FOR THE NATION AND THE GLOBAL COMMUNITY, THE PLATFORM OFFERED A DIVERSE ARRAY OF EDUCATIONAL MULTIMEDIA RESOURCES AIMED TO PROVIDE ESSENTIAL INFORMATION FOR COMPREHENDING THE PRIMARY SEASON, THE GENERAL ELECTION, AND THE POST-ELECTION TRANSITION. THE PLATFORM SERVES AS A COMPREHENSIVE RESOURCE, OFFERING PODCASTS, BLOGS, VLOGS, INFOGRAPHICS, AND EXPLANATORY ANIMATIONS. IT CATERES TO STUDENTS, JOURNALISTS, DIPLOMATS, THE POLICYMAKING COMMUNITY, AND THE PUBLIC. THE WORK POSTED TO THE ELECTION HUB ONLINE YIELDED DOZENS OF OPPORTUNITIES FOR IN-PERSON BRIEFINGS, ROUNDTABLES, AND FORECASTING WORKSHOPS RELATED TO HELPING OUR AUDIENCE BETTER UNDERSTAND THE PROCESS AND IMPLICATIONS OF THESE ELECTIONS.</p> <p>TRANSATLANTIC EXPERT GROUP BRIEFING ON U.S. ELECTIONS, BERTELSMANN STIFTUNG, BERLIN, GERMANY (APRIL 16, 2024): COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS, CONDUCTED A BRIEFING ON THE U.S. ELECTIONS FOR THE TRANSATLANTIC EXPERT GROUP MEETING AT THE BERTELSMANN STIFTUNG IN BERLIN, GERMANY. THE PARTICIPANTS CONSISTED OF SENIOR POLICY EXPERTS FROM THE U.S. AND EUROPE. THE PRESENTATION DELVED INTO OPINION POLLING ON THE STATE OF U.S. DEMOCRACY LEADING INTO THE GENERAL ELECTION, A LOOK INTO THE DRIVING ISSUES IN KEY PRIMARY STATES SUCH AS IOWA, SOUTH CAROLINA, AND GEORGIA, AS WELL AS GENERAL ELECTION TRENDS SUCH AS LOW VOTER TURNOUT AND DISSATISFACTION WITH THE MAJOR PARTY CANDIDATES. THE PRESENTATION CONCLUDED WITH A SHORT OVERVIEW OF WHAT TO EXPECT FROM A SECOND BIDEN OR TRUMP TERM, AND SEGUED INTO A DISCUSSION ON FOREIGN AND DOMESTIC POLICY</p>

Identifier	Return Reference	Explanation
		<p>CONCERNS, YOUTH VOTER ATTITUDES, AND THE IMPACT OF THE U.S. ELECTION ON TRANSATLANTIC RELATIONS. U.S. ELECTIONS OVERVIEW FOR VISITING DELEGATION OF EUROPEAN PARLIAMENT STAFFERS, BERTELSMANN FOUNDATION, WASHINGTON, DC (JUNE 27, 2024): COURTNEY FLYNN MARTINO, SENIOR MANAGER OF TRANSATLANTIC RELATIONS, CHLOE LADD, MANAGER OF TRANSATLANTIC RELATIONS, MARSHALL REID, SENIOR MANAGER OF U.S.-EU-ASIA DYNAMICS, AND SAMUEL GEORGE, GLOBAL MARKETS AND DIGITAL ADVISER, HOSTED A DELEGATION OF 12 EUROPEAN PARLIAMENT STAFFERS AND THREE MEMBERS OF THE EUROPEAN PARLIAMENT LIAISON OFFICE FOR A BRIEFING ON THE 2024 U.S. ELECTIONS. BERTELSMANN STAFF OPENED THE PRESENTATION WITH AN OVERVIEW OF THE FOUNDATION'S WORK, HIGHLIGHTING THE DEMOCRACY PROJECT, DOCUMENTARY WORK, DIGITAL PLATFORMS, AND REGIONAL RESEARCH PORTFOLIOS. COURTNEY FLYNN MARTINO THEN PRESENTED ON THE 2024 U.S. ELECTIONS FOR THE DELEGATION, WITH AN EMPHASIS ON VOTER ENGAGEMENT, KEY TRENDS, AND DRIVING CAMPAIGN ISSUES. FOLLOWING THE PRESENTATION, PARTICIPANTS DISCUSSED THE U.S. ECONOMY, MIGRATION AND IMMIGRATION, AND HOW TO ENGAGE YOUNGER VOTERS. PROJECT 2025 WEBINAR BRIEFING (AUGUST 1, 2024): THE BERTELSMANN FOUNDATION HOSTED A WEBINAR BRIEFING FOR EU DIPLOMATS ON PROJECT 2025, THE HERITAGE FOUNDATION'S MANDATE FOR LEADERSHIP FOLLOWING THE NEXT US PRESIDENTIAL ELECTION. THE DISCUSSION WAS MODERATED BY BFNA'S TONY SILBERFELD AND FEATURED PRESENTATIONS FROM CATHRYN CLUVER ASHBROOK, SENIOR ADVISER FROM THE BERTELSMANN STIFTUNG, AND BRANDON BOHRN, PROJECT MANAGER AT THE STIFTUNG'S EUROPE'S FUTURE PROGRAM. FOLLOWING A DISCUSSION ON THE DETAILS OF PROJECT 2025, THE AUDIENCE REPRESENTING 19 EU MEMBER STATES ENGAGED IN A Q&A SESSION WITH THE SPEAKERS. THIS EVENT WAS PART OF BFNA'S ONGOING WORK ON THE 2024 US ELECTION. ELECTION DISINFORMATION ROUNDTABLE, BERLIN, GERMANY (SEPTEMBER 22, 2024): THE BERTELSMANN FOUNDATION'S EXECUTIVE DIRECTOR IRENE BRAAM MODERATED A ROUNDTABLE DINNER IN BERLIN TO DISCUSS THE IMPACT OF DISINFORMATION ON THE U.S. ELECTIONS. THE CONVERSATION KICKED OFF WITH OPENING REMARKS BY RENEE DIRESTA, FORMER RESEARCH DIRECTOR OF THE STANFORD INTERNET OBSERVATORY, AND DAVID BECKER, FOUNDER OF THE CENTER FOR ELECTION INNOVATION AND RESEARCH. FOLLOWING THESE COMMENTS WAS A FACILITATED DISCUSSION WITH REPRESENTATIVES FROM THE GERMAN GOVERNMENT, THINK TANKS AND JOURNALISTS. U.S. ELECTIONS BRIEFING FOR FREIBURG BUSINESS DELEGATION, DELEGATION OF GERMAN INDUSTRY AND COMMERCE, WASHINGTON, DC (SEPTEMBER 30, 2024): BFNA SENIOR MANAGER OF US-EU-ASIA DYNAMICS MARSHALL REID SPOKE WITH A DELEGATION OF GOVERNMENT AND BUSINESS OFFICIALS FROM THE GERMAN CITY OF FREIBURG ABOUT THE UPCOMING US ELECTION. THE EVENT WAS HOSTED BY THE DELEGATION OF GERMAN INDUSTRY AND COMMERCE IN WASHINGTON, DC, AND ALSO INCLUDED SPEAKERS FROM THE GERMAN EMBASSY TO THE UNITED STATES AND THE AMERICAN-GERMAN INSTITUTE. DURING THE PRESENTATION, MARSHALL BRIEFED PARTICIPANTS ON THE PRESIDENTIAL CANDID</p>

TY 2024 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	500,530	0	
HARDWARE & SOFTWARE	374,031	354,099	19,932	19,932
WEBSITE	396,338	351,915	44,423	44,423

TY 2024 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	474,540	0	0	474,539
MISCELLANEOUS - OPERATING EXP	78,677	0	0	78,677
EVENT EXPENSES	60,551	0	1,462	60,864
OFFICE EXPENSES	43,561	0	3,670	39,891
REPAIRS AND MAINTENANCE	28,382	0	0	28,382
INSURANCE	25,447	0	0	25,447
EQUIPMENT AND SUPPLIES	24,731	0	0	24,731
TELECOMMUNICATIONS	23,277	0	0	23,277
PRINTING AND PUBLICATIONS	20,926	0	0	20,926
MEDIA (SUBSCRIPTION)	16,297	0	0	16,297
HONORARIA	4,000	0	0	4,000
POSTAGE AND SHIPPING	2,999	0	0	2,999
TRANSLATIONS	2,416	0	0	2,416
STAFF DEVELOPMENT	1,349	0	0	1,349
BANK CHARGES	1,086	0	0	1,086

TY 2024 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
DOMESTIC OUTREACH AND CLIMATE TALKS	28,000		28,000

TY 2024 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	3,103	0	0	3,103
COMPUTER NETWORKING & TELECOMM	37,038	0	0	37,038
COMPUTER SUPPORT & MAINTENANCE	39,996	0	0	39,996
CONSULTANTS	10,000	0	0	10,000
WEB SUPPORT	982	0	0	982
OTHER PROFESSIONAL FEES	252,996	0	0	252,996
STAFF CONSULTING & PLACEMENT	40,000	0	0	40,000

TY 2024 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	82,973	0	0	82,973