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BUILDING ON WHAT WE'VE LEARNED
REPORT '11



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REAFFIRMING OUR APPROACH



Last year we announced that Will Miller had been appointed to succeed M. Christine DeVita, who had run Wallace since its formation. Acknowledging that event, we predicted a year of transition.

Looking back today, that forecast was correct. All of our philosophies and operating practices have been reviewed and tested. While we anticipated change and are now experiencing just that, we can report that our mission of expanding learning and enrichment opportunities for children is fundamentally unchanged. In addition, Wallace remains committed to a knowledge-based approach in which investments are made in innovation. The results of those investments are supported by independent analysis and then broadly communicated to be used by others providing learning and enrichment, and by policymakers. We remain confident that this is the correct approach for Wallace to maximize the benefits of our philanthropy.

The origins of The Wallace Foundation lie in the personal philanthropy of our founders DeWitt and Lila Wallace, who created foundations in their names in the 1950s and 60s. While their interests in education, youth development and the arts continue to guide our priorities, our grantmaking has evolved. The Wallaces died in the early 1980s. With little staff in its early years, the foundation made funding decisions based largely on directors' recommendations.

In the 1990s, our first decade as a national foundation, we launched more than 100 different initiatives. But as the decade drew to a close in 1999, despite notable successes, we were not satisfied we were reaping the maximum social return we could achieve from the dollars we were investing: Programs often ended along with our grants, suggesting they may not have been compelling or cost-effective, and they rarely contributed to broad, fundamental change. Seeking greater impact from the resources held in our trust, we developed our current knowledge-based approach, now reaffirmed, refined and deepened.

I am grateful to Wallace's Board for providing thoughtful guidance in this process.

From 2001 until the retirement of Don Cornwell in 2012, our board had the benefit of Don's perspective. He brought a keen banker's eye to helping the investment committee balance growth and capital preservation. As the co-founder of a television broadcasting group, he was a champion of effective communications. And as a citizen, he believed in the power of the arts to strengthen communities. We will miss Don's quiet wisdom and collegial presence on the Board.

We are pleased to welcome a new Board member, Amor Towles, to serve on the Investment Committee. Amor is a former director of research and partner at Select Equity, a New York City investment firm. He brings a strong interest in the arts and humanities, having published a novel, *The Rules of Civility*, and serving on the boards of the Library of America and Yale Art Gallery. ■

A handwritten signature in black ink that reads "Kevin W. Kennedy". The signature is written in a cursive, flowing style.

Kevin W. Kennedy, Chairman

SIX REFLECTIONS



2011 was a year of transition at The Wallace Foundation. On July 1, I had the privilege of succeeding our founding president, M. Christine DeVita, at the helm of the organization. As we look forward, there is no question we can see further because we are standing on her shoulders and those of the people with whom she worked.

Although my principal career has been in business, I have been engaged with the challenges faced by institutional donors for nearly 40 years, primarily as a member of the board of directors of a wide range of philanthropies – including family, community, corporate, and global foundations. I have also seen these challenges from the other side of the table, having spent considerable time as a member of organizations or coalitions that have sought funding from foundations big and small.

The philanthropic challenges that have intrigued me the most over those years have been the twin questions of (a) how donors think they can best add value to society and (b) how they will know if they do.

These questions seem to me particularly germane for endowed institutions whose donors entrusted those who would come after them with wide latitude in how the money is to be given away. The diversity of approaches to philanthropy in the United States is a wonderful aspect of our society. However, when one is charged with giving away wealth one did not create – in other words, when it isn't your money – I believe it is especially important to focus on answering these two questions to the best of your ability.

Among the several attributes of the foundation that drew me to the opportunity to be its president, none was more important than the strategic approach to philanthropy Wallace has developed and refined over the last 10 years or so. This approach seemed to me to offer thoughtful and compelling answers to these challenges.

About a decade ago, the Wallace board grew disappointed that programs we had funded often stopped when our funding ended, a sign that our perception of the value they were creating was not fully shared by others. The board also sensed a missed opportunity when good ideas didn't spread beyond a funded organization – whether because of insufficient evidence of positive effects, difficulty in figuring out how to replicate them, or lack of awareness.

As a result of this disappointment, Wallace developed an approach that seeks to broadly inform policy and practice by overcoming these three barriers; in other words: generating evidence, producing guidelines for replication or adaptation, and building awareness. By investing in the creation of evidence about what does and does not work – and sharing that evidence broadly – Wallace has both a reasonable proposition about how it can add value beyond the good works of its grantees and a clear lens through which to assess its impact. To put this into foundation parlance, the creation and dissemination of knowledge is at the core of Wallace's "theory of change." The compelling opportunity for me was to build on this legacy to take it to the next level by refining the strategy, deploying it more consistently in what we do, and aligning our operational model and staff resources with it.

“Wallace tries to develop knowledge that, if picked up and used by practitioners and policymakers, has real potential to help address an important social problem.”

SIX REFLECTIONS ON MY EARLY DAYS

My colleagues and I began our work together by taking a closer look at lessons from the foundation’s successes and disappointments. From this work, we drew a set of reflections that will influence our path going forward. I share these reflections not to suggest that ours is the best model for philanthropy or that others will necessarily want to emulate them, but with the hope that being transparent about our own thinking will help pave the way for continuing dialogue with all our stakeholders and partners outside the foundation.

A PARTICULAR KIND OF KNOWLEDGE

First, the kind of knowledge we seek to develop is of a particular type. It is knowledge, that, if picked up and used consecutively by practitioners and policymakers, has real potential to help address an important social problem. To make a meaningful difference, it has to be knowledge for which we believe there will be, at some point, demand. So, in effect there are two tests for the knowledge gaps we seek to address: They have to be (a) questions where the answers are unknown or evidence is weak and (b) on topics that are important to the field and where the evidence will be useful in the real world. Some of the foundation’s most effective work has been in areas where it has done a good job in identifying and filling a high-leverage knowledge gap: for example, whether and how school principals can contribute to helping school reform efforts succeed or which innovative practices help arts organizations build audiences.

THINKING ABOUT STRATEGY AS A CYCLE

Second, there are benefits to thinking of our approach to philanthropy and our work with our partners as a continuous cycle rather than a linear process. We now envision our “theory of change,” illustrated at www.wallacefoundation.org/learn-about-wallace/approach-and-strategy/Pages/our-approach-to-philanthropy.aspx, as a circle. We typically begin with conversations with our current and potential grantee partners, field experts, researchers, academics, policymakers, and other useful voices to analyze and understand the context for our areas of interest. Our aim is identify major knowledge gaps that, if filled, could lead to progress. Once we have the questions we are addressing framed well, we work with grantees and researchers to generate improvements and insights and build promising new approaches and evidence. As we learn what works and does not work, we seek to catalyze broad impact by sharing this knowledge widely in a variety of forms and through many channels with the aim of improving policy and practice nationwide.

Perhaps the best example of the benefits of conceiving of our work as a cycle is our work in the principal pipeline initiative. A concerted effort in the early part of the last decade to understand what makes a principal effective at driving school improvement led to a series of useful insights: We learned that effective school leadership is second only to the quality of teaching among school-based influences on student achievement – and the research we funded identified the behaviors of these school leaders that drove those results. This led to the question of how such behaviors could be taught. A

landmark study led by Linda Darling-Hammond in 2007 identified the essential elements of effective principal preparation programs. In listening to the field, we realized all of this begged a bigger question – and another knowledge gap: Could a school system build a principal pipeline that aligned leader standards, selection processes, training programs, and on-the-job support to the research on what makes principals effective in order to have a sufficient number of effective principals in its schools to improve student achievement across the entire district? Thus, our earlier work in education leadership led directly to our \$75 million, six-year principal pipeline initiative in six school districts across the country, announced in June 2011, which you can read about it on [page 9](#).

It is worth noting that our work sometimes takes place simultaneously at different points of the cycle. We are generating improvements and insights on how a principal pipeline can be built, while simultaneously sharing lessons about effective training programs and listening to field leaders on emerging issues like the Common Core State Standards and its link to school principals.

REAL-TIME INTERACTIONS OF RESEARCH AND PRACTICE

Third, providing independent research and technical support in real-time can simultaneously help grantees strengthen their own work and improve the research by deepening insights that can contribute to the field. Our best example of this is the district demonstration portion of our summer learning

work. This effort seeks to fill an important knowledge gap: Although we know a good deal about the harmful impact of summer learning loss and its contribution to the achievement gap, we know much less about whether a district-wide effort could improve student achievement in ways that persist for several years and thus help close the achievement gap over time. To address the unanswered questions, we are working with a set of school districts to fund high-quality summer learning programs, and then undertake a rigorous evaluation from 2013 to 2016 to find out whether and how students benefited and whether those benefits last. Since this is new territory for our participating districts, we wanted to be able to separate issues related to moving down the learning curve for the first time – “learning to ride a bicycle” – from the effects of a well designed and implemented program – “riding a bike once you are good at it.” We needed first to help districts strengthen their programs sufficiently to permit a “fair test” of

their approaches. Our districts needed to know what parts of their current programs reflected best educational practices, and which parts did not. In each of 2011 and 2012, the first two years of our initiative, we contracted with the RAND Corporation to provide independent assessments of each district’s programs, and develop recommendations on how they could be strengthened. Using the findings of these assessments, districts will be able to strengthen their programs significantly before the evaluation of effects begins in 2013. The implementation evaluations will serve a dual purpose, helping the districts get ready for the effects evaluation and, when we publish reports on what was learned about the challenges of starting up a program in a district setting, providing useful practical implementation insights to the field.

OPPORTUNITIES TO SHARE WHAT WE LEARN MORE EFFECTIVELY

Fourth, we believe we can do more to make the insights and evidence we gather useful and applicable to practitioners and policymakers. Research results do not have much impact unless people know how to apply the insights in their own settings. Work on this was under way before 2011 in the form of developing practical products for practitioners – such as tools, self-assessment guides, rubrics, and tip sheets – and making them available for free on our Web site. We also believe we can be more consistent in sharing information directly with policymakers, making sure that those on both sides of

“Research results do not have much impact unless people know how to apply the insights.”

the aisle are aware of what we have learned. In spring 2012, we gave a bipartisan briefing on Capitol Hill on what we have learned about training and supporting school principals, and their importance. We have joined with the Charles Stewart Mott Foundation to hold a series of nationwide mayoral summits to share lessons on how cities can build after-school systems.

THE VALUE ADDED OF NON-MONETARY ASSISTANCE

Fifth, Wallace has a great deal of experience in providing various forms of non-monetary assistance. Feedback from our grantees, through sources like the anonymous grantee perception survey conducted for us every two years by the Center for Effective Philanthropy, has indicated one of the most valuable forms of non-monetary assistance is pulling together grantees in an initiative into a “learning community” that meets in person, online and by phone to share what they are learning with each other and to learn from outside experts.

We have seen three benefits from this practice: Organizations find great value in advice from their peers; meetings of the communities are great ways for Wallace to stay in touch with grantees and their concerns; and the communities are great sources of new knowledge products, such as guidebooks or tools that can be useful to the field. One such tool we expect to release in the near future will help principal preparation providers (and districts that hire their graduates) assess the quality of their programs.

“We look for opportunities to engage with our grantees in early planning that prepares them to make decisions about what is worth sustaining, what is worth adapting, and what should be abandoned because it didn’t work or was not cost-effective.”

SUSTAINABILITY BEGINS ON DAY ONE

Finally, we have learned that it is useful to think with grantees right from the beginning of our relationship about whether and how the efforts we fund can be sustained. As a foundation that takes risks by funding innovation, we recognize that not everything new will be worthwhile, or worth sustaining. Nonetheless, sustaining the work that is worthwhile was the critical issue of impact that sparked Wallace’s development of its strategic approach to philanthropy over the last 10 years. In the second half of the last decade, we introduced focused discussions of sustainability planning in the third year of a five-year initiative in education leadership. Our grantee partners told us this work, while difficult, was extraordinarily helpful – and the results in the early years after the end of our funding back this up: A Wallace survey of grantees from our “first generation” of Wallace education leadership work found that the respondents expected that close to 70 percent of 143 successful projects would continue at least until 2014. However, our grantees have also told us it would have been even more helpful if we had started these conversations much earlier in the initiative. We now look for opportunities to engage with our grantees, as early as it makes sense, in planning that prepares them to make decisions about what is worth sustaining, what is worth adapting, and what should be abandoned because it didn’t work or was not cost-effective.

MOVING FORWARD

These reflections, developed in collaboration with my colleagues at Wallace, have several implications for our work moving forward:

- Knowledge is at the core of our work and that of our partners; to develop and share it effectively, we will continue to knit together the perspectives of the program, research and communications staffs in an inter-disciplinary approach.
- We will strive to learn continuously from and with our partners, listening to those in the fields in which we work, and seeking to create an atmosphere of candor and inquiry that supports open exchange and sharpening of our thinking.
- We will seek to support research that simultaneously helps our grantees advance and helps others in the field.
- We will continue to invest in grantee learning networks or “learning communities” as a means of encouraging joint learning.
- And we will work to help grantees think about whether and how they will sustain their work.

In this letter, I have tried to lay out our latest thinking about our strategic approach to philanthropy at The Wallace Foundation and how we will add value to society as good stewards of the funds that have been left in our trust by DeWitt and Lila Acheson Wallace. But it is not enough to have a good strategy. An organization also has to execute well to achieve results and, as noted above, has to have some way of assessing what results it is achieving. In my experience, these factors have as much to do with the culture and values of an organization as its strategy. Accordingly, we have also examined our behavior and habits in working together and with external partners for their alignment with our strategy and values. As an organization of human beings, we have and always will have room for improvement. Part of our thinking about how to take Wallace to the next level involves our renewed commitment to:

- Measuring and assessing our own results wherever possible based on objective evidence;
- Being candid about the progress of our initiatives, as we have tried to be in our annual reports;
- Sharing what we’ve learned from our evaluations – whatever the findings may be – while being honest about the state of the evidence, recognizing that learning what does not work can be just as valuable as learning what does, and sometimes “we don’t know” may be the best answer; and
- Maintaining a balance between self-confidence and humility in recognition that without courage, we will be unable to take risks or tackle complicated problems in controversial areas, and without the ability and willingness to acknowledge when we are wrong, do not have all the answers, and need to adjust our views, we will be unable to learn and make progress.

Ultimately, being good stewards means working to contribute as effectively as we can to progress by seeking ways to add value to the great work of our grantees and partners. In an age where increases in public funds are unlikely, it’s crucial that both private philanthropic resources and scarce public dollars be spent as wisely and effectively as possible. Decisions will inevitably be difficult. Working with our partners to fill important gaps in knowledge in the areas in which we work, we at Wallace hope to help make both our own decisions and those of practitioners and policymakers be better-informed and more effective. ■

Will Miller

*Summer drawings from students at
Horizons National programs in Dedham,
Mass., and New York City.*



SCHOOL LEADERSHIP

Wallace has been working since 2000 to improve leadership in our nation's schools, hoping to help develop and support principals who can improve teaching and learning, especially in troubled urban schools. After harvesting the lessons from our first 10 years, we embarked in 2010 on a “next generation” initiative, driven by three strategies:

- ***Building a principal pipeline:*** Testing what happens when school districts and principal training programs work together to fashion and interlock the necessary components of principal training and on-the-job support.
- ***Disseminating ideas:*** Ensuring that those who can make change happen in urban education become familiar with what we know about school leadership.
- ***Developing tools:*** Turning findings from our work into practical products for the field.

OVERVIEW OF 2011 – SIGNIFICANT DEVELOPMENTS AND CHALLENGES

RIBBON-CUTTING FOR A NEW PRINCIPAL PIPELINE INITIATIVE

In August 2011, Wallace launched a six-year, \$75 million initiative to help selected school districts develop and align four essentials to shaping effective principals:

- leader standards;
- high quality preparation;
- selective hiring; and
- on-the-job support, particularly mentoring and meaningful performance evaluations, for novices.

Wallace launched a six-year, \$75 million initiative to help selected school districts develop and align four essentials to shaping effective principals.

Wallace conducted a competition to identify districts to participate in what we call the principal pipeline initiative and chose six whose commitment to strengthening leadership was evident in pipeline work they had begun on their own: Charlotte-Mecklenburg in North Carolina; Denver; Gwinnett County, Ga. (outside Atlanta); Hillsborough County, Fla. (encompassing Tampa); New York City; and Prince George's County, Md. (near Washington, D.C.).

An integral part of the initiative design is an independent study that will look at questions including whether the pipelines (after they have been working for several years) affect student achievement. This study is being carried out by a team from two research organizations, Policy Studies Associates, Inc. and the RAND Corp.

In 2011, each district developed an individual work plan, but all the plans had some common themes, including developing or revising leader standards, providing internships for aspiring leaders, and mentoring for new leaders.

In addition to supporting such undertakings, Wallace began assisting the districts in overcoming challenges they face in common. A key facet of the initiative is a “professional learning community” that regularly brings the districts together with one another, and with organizations that can provide expertise and guidance, to discuss problems and possible solutions to them. One group within the



Bob Bender, principal of P.S. 11 in New York City, was trained at the Wallace-Supported NYC leadership Academy.

community, for example, began investigating ways to sustain mentoring programs for novice principals despite the economic downturn. The learning community is managed by the NYC Leadership Academy, a nationally-recognized principal training organization founded with Wallace support. We have also provided the districts with technical assistance, including the services of the Education Development Center, a nonprofit research and development company, to help the grantees assess and improve the quality of their aspiring-leader training programs.

An August gathering at Wallace brought the districts together with the distributors of VAL-ED, a Wallace-commissioned principal evaluation instrument developed by researchers at Vanderbilt University. At least five of the districts intend to use VAL-ED to assess how their leaders are doing and what further training they need. The challenge here is to make sure that other career development tools in use by the districts – such as hiring interview protocols, assessments of applicants to training programs, and mentoring questionnaires – are in sync with each other, the district leader standards, and VAL-ED.

A challenge of the initiative in general is working in a way that accommodates variety. Each of the districts is at a different stage in developing the pipeline as a whole and the four component parts individually. Both our grant support and the research are taking this variation into account.

Knowledge dissemination: Wallace continued working with organizations, such as The Education Trust, that help us bring our ideas and evidence to approximately 40,000 policymakers and practitioners. We also began planning for the publication of four related reports – Wallace “perspectives” – that synthesize findings from our leadership efforts over the years and highlight key lessons for the field. The first of these – *The School Principal as Leader: Guiding Schools to Better Teaching and Learning* – was released early in 2012.

Development of tools: With Wallace support, four projects to develop practical guides and tools for improving education leadership got under way. These include a guide to developing and conducting principal training based on the NYC Leadership Academy’s work and a tool to help districts assess whether their central offices support teaching and learning in schools.

LOOKING AHEAD

For 2012, Wallace plans to further our work in all three education leadership strategies.

Principal pipeline: In 2012, our focus will remain squarely on monitoring the initiative’s progress and helping the districts improve their efforts.

Knowledge dissemination: We are seeking to broaden our reach to key policy and education leaders in various ways, including participation in roughly 35 conference sessions and 12 webinars. Our media grant-giving focuses on encouraging coverage of leadership issues.

Development of tools: The tool projects under way will continue while Wallace considers supporting additional useful products, such as an assessment instrument that districts can use to gauge the quality of the mentoring they provide to new principals. ■

AFTER SCHOOL

Since 2003, our work in after-school programming has been based on two ideas: (a) poor urban youngsters benefit from frequent participation in high-quality enrichment programs; and (b) communities can boost program quality and make programming more readily available through citywide after-school “systems,” a formal knitting-together of the activities of municipal agencies, schools, nonprofit youth programs and other institutions vital to after-school services.

Wallace’s initiative covers two generations of work. The first, launched in 2003, centered on five cities – Boston, Chicago, New York City, Providence and Washington, D.C. – where Wallace grants supported nascent citywide systems to improve after-school opportunities for poor children and teens. In 2010, a RAND report concluded that this work had provided a “proof of principle – that organizations across cities could work together toward increasing access, quality, data-based decision making, and sustainability.” The first generation work also included a project in Chicago to test whether improvements in financial management at 26 youth-serving agencies could have a positive impact on the quality of their after-school programs.



Maria Pesqueira is president and CEO of Mujeres Latinas, a Wallace strengthening financial management grantee.

Building on these efforts, the foundation has launched a second generation of the initiative, which seeks to encourage other cities to draw on the lessons learned by the first five cities, specifically by:

- Raising awareness of the value of after-school systems and how to build them.
- Developing guides and other materials to help city leaders build after-school systems.
- Spurring stronger system building through incentives to cities with work under way.

OVERVIEW OF 2011 – SIGNIFICANT DEVELOPMENTS AND CHALLENGES

To help increase understanding about after-school systems, we supported several organizations that can help spread the word – the National League of Cities, which reaches mayors and youth commissioners who are in a position to build systems; the Afterschool Alliance, the leading national organization for after-school programs in the United States; and four statewide after-school networks, which work on behalf of after-school programs at the state level. We also teamed up with the Charles Stewart Mott Foundation to co-sponsor nine mayoral summits across the nation that include lessons on system building.

In addition, we made significant progress on developing practical guides to help those involved in after-school system building manage thorny aspects of their work. In 2011, we conducted market research on what information would be most useful to practitioners in the field. The projects growing out of this research include a set of tip sheets on using data and a detailed guide to developing better program quality.

Much of our time in 2011 was devoted to preparing for a second round of grants for system-building projects. Our aim is to incorporate into the effort a knowledge-building agenda to garner additional insights, which can be shared with the entire field, into data use as well as the ins and outs of improving programs.

Wallace has made significant progress in developing practical guides to help those involved in after-school system building manage thorny aspects of their work.

One ongoing challenge was the toll that a weak economy continued to take on funding for after-school programs. Local budget cuts resulted in enrollment declines in after-school programs that are part of several city systems we have supported. New York City programs, for one, served about 69,000 children and teens in 2011 – a drop of about 5,000 from 2010. In this environment, after-school efforts continued to focus on boosting program quality. Several reported modest increases in children’s level of participation in activities. This is good because the more a child takes part in programs, the better the chance he or she will emerge with school-related or

developmental benefits. Participation is also a rough barometer of quality: Youngsters tend to return to good programs and walk away from bad ones.

Strengthening Financial Management

The current fiscal climate has also elevated the importance of financial management skills among non-profit providers of after-school programming. Fiscal Management Associates, the consultant offering the training and other services to the nonprofits in our Chicago financial management initiative, found that several of them eliminated or avoided deficits in 2011, perhaps because of their new financial savvy. Many also discarded a common but less-than-optimal practice among nonprofits – budgeting by anticipated funding. Instead, they budgeted based on the services they provide.

Better nonprofit financial management requires work with funders as well. Too often, government agencies are very slow to pay for services contracted with nonprofits. Some 41 percent of nonprofits across the country report late state payments, according to a 2009 study by the Urban Institute. That’s the reason we had a second prong in our initiative – setting up a forum in which Illinois funders and nonprofits worked out proposals for more supportive government funding practices and policies. Those proposals, captured in a report titled *Fair and Accountable: Partnership Principles for a Sustainable Human Services System*, helped prod changes in Springfield, but the task of making the case in 49 other state capitals – to say nothing of Washington, D.C. – is a big one.

LOOKING AHEAD

For 2012, we planned to move ahead with the second generation after-school initiative, in which after-school efforts in nine cities receive financing and other assistance to build up their after-school systems. The effort is to focus in particular on helping cities develop strong data systems and ways to improve program quality on a wide scale. We also planned to develop a Web tool to help nonprofits with financial management. Finally, we were looking forward to the publication of a report, by the Public/Private Ventures research firm, documenting the financial management initiative and discussing emerging lessons. ■

EXPANDED LEARNING OPPORTUNITIES

There's growing reason to believe that the conventional six-hour, 180-day school year may not provide enough time for learning, especially for disadvantaged urban students. The evidence is clear that the cumulative effect of learning loss during summer vacations contributes to the gap in achievement between lower and higher income children, and that high-quality programs can mitigate that loss and even lead to achievement gains. There are also suggestions that a longer school day and year may help boost student achievement. Wallace is seeking to address these issues through supporting nonprofits and school districts that are trying out ways to expand learning time during the summer and regular school day or year.

SUMMER LEARNING

Making Summer Count is the title of a RAND Corporation report that Wallace commissioned and published to much notice in 2011. It is also an apt description of our initiative. We are seeking to fill the summers of poor urban children with activities that matter – programs that can stem the summer learning loss that takes a particularly large toll on youngsters with the fewest advantages in life. Our work rests on three strategies:

- Raise awareness of the problem and possible solutions.
- Support leading national nonprofit programs to ride out the weak economy and expand.
- Help districts test and evaluate large-scale programs of their own.

OVERVIEW OF 2011 – SIGNIFICANT DEVELOPMENTS AND CHALLENGES

A particularly noteworthy occurrence in 2011 was the publication of RAND's *Making Summer Count*, characterized by *Education Week's* Beyond School blog as "the first comprehensive research on summer slide."

Since 2010, we have been supporting three nonprofit providers, BELL (Building Educated Leaders for Life), Higher Achievement and Horizons National. As indicated in the chart below, each provider has expanded to serve more children, one of the main purposes of their grants:

CHILDREN SERVED	BELL	Higher Achievement	Horizons National
Summer 2009	3,008	508	1,689
Summer 2010	7,336	610	1,833
Summer 2011	9,252	805	2,015

A continuing focus for all these groups is finding stable and secure funding to sustain and expand their work.



SailZone is part of the summer programming offered through the Providence After School Alliance, a Wallace grantee.

In 2011, a Wallace-commissioned study of Higher Achievement’s summer program found that although participating youngsters – motivated middle school students – showed benefits including greater interest in attending competitive high schools, they did not experience greater academic gains in reading and math than a comparison group. The reason, the authors speculate, may be that the comparison families, like their Higher Achievement peers, also “sought out enriching summer experiences,” making the experiences of the two groups similar.

Another 2011 milestone was our launch of a six-year effort in six school districts to develop high-quality, large-scale summer programs and find out, among other things, whether they can reduce or eliminate summer learning loss. The districts are Boston, Cincinnati, Dallas, Duval County, Fla. (Jacksonville), Pittsburgh and Rochester. The RAND Corporation assessed the quality of the six districts’ first-year efforts and in the fall gave feedback to each district on ways to improve their programs in the future. The six districts experienced a number of common challenges – including recognizing the amount of lead time it takes to plan a program well and providing adequate training to summer teachers – which are being addressed in their plans for 2012. Wallace also sponsored a “town hall” event in five of the cities to broaden interest in and support for summer learning within each school district.

LOOKING AHEAD

In 2011, we assembled BELL and the other Wallace-funded summer learning providers into a “professional learning community” (PLC), a formal group in which grantees learn from and share ideas with one another. Senior staff members from the grantee organizations participated in activities such as webinars, meetings and visits to each other’s programs. Participants told us this non-monetary assistance was highly valuable. In 2012, we plan to expand the PLC to include school-year expanded learning time grantees as well.

We also plan to publish a distillation of the lessons from the first year of summer learning programs in school districts. We look forward to the continued programmatic improvements by our grantees for their second-year efforts. We also plan to launch a PLC for the six school districts taking part in the initiative.

SCHOOL-YEAR EXPANDED LEARNING TIME

The conventional school calendar hasn’t much changed since it was introduced broadly in the United States in the early part of the 20th century. Today, children still spend only about 20 percent of their waking hours in the classroom. Families with means can ensure that their children have many other

opportunities to learn. Not so their poorer counterparts. Our initiative, then, rests on the idea of rethinking the traditional schedule so that poor urban children get what they need to flourish in the 21st century. Wallace's work in the area emerges from two primary strategies:

- Raising awareness of the issue.
- Supporting leading nonprofits that work with schools to expand learning time.

OVERVIEW OF 2011 – SIGNIFICANT DEVELOPMENTS AND CHALLENGES

In contrast to the effects of summer learning loss and how to use summer to bolster academic achievement, much less is known about the effects of expanded learning time (ELT) in the form of a longer school day or year. In our early planning for this initiative, we had considered making grants to nonprofits to participate in a potential research and demonstration project akin to the one under way in summer learning. Having realized how much remains to be learned about ELT, we opted instead to focus on gaining a better understanding of the context in which the field operates and the most promising approaches. We have, therefore, embarked on an approach to ELT that combines funding of promising programs with funding for a study and consultations with field leaders to learn more about why, how and with what activities ELT can increase young people's achievement. This will help us as we shape our work in the future.

The conventional six-hour, 180-day school year may not provide enough time for learning, especially for disadvantaged urban students.

Raising awareness: We held a May conference called Reimagining the School Day that attracted about 100 people, representing a rare joining of after-school and public

education leaders. The event led to a conference publication, also called Reimagining the School Day, which received positive attention in the form of coverage by Education Week, Educationnews.org and The Huffington Post. We were gratified by this but also recognize that the popularity of the subject makes it particularly important that we provide a realistic, evidence-based perspective on it.

Supporting leading organizations: In 2011, we began our first major investments in expanded learning time, totaling more than \$21 million. In large part, this funding went to support four leading nonprofit ELT program providers with evidence of effectiveness: Citizen Schools, Communities in Schools, The After School Corporation, and Say Yes To Education. A theme throughout these four grants was partnership. In three of the grants, we teamed up with other philanthropies to support ELT organizations. In the fourth, we funded an ELT effort made possible by the joint work of a variety of community institutions:

- We worked with the Edna McConnell Clark Foundation to support Citizen Schools and Communities In Schools, two national nonprofits that work in schools to improve opportunities for youngsters. In Citizen Schools' case, we matched a contribution from Clark and joined a collaboration of funders assembled by that foundation. Our grant to Communities In Schools, coupled with a contribution from Clark, enabled the organization to qualify for a separate grant from a federal program.
- We teamed up with George Soros's Open Society Foundation to help The After School Corporation (TASC) introduce its innovative ELT program to more schools in New York City as well as in Baltimore and New Orleans.
- We awarded a three-year grant to Say Yes to Education to test and expand its ELT model in Syra-

cuse, N.Y. The effort is the embodiment of collaboration, aiming to coordinate the work of many local institutions – including schools, universities, city and county government, and social service agencies – across an entire community.

Partnership also emerged as a major theme at the Reimagining the School Day conference. Participants emphasized that schools cannot do the work of expanding learning time alone and that more learning time likely means more collaboration among public education, nonprofits and other institutions. We are very interested in encouraging more collaboration when appropriate, as a tool to multiply the effects of philanthropic dollars. Having said that, we are also well aware that collaborations can exact what’s been called the “partnership tax:” They can be time intensive, present difficulties if potential partners do not share a common agenda, and sometimes involve giving up autonomy in decision-making, which risks creating delays and other inefficiencies. We need to balance all these factors as we explore collaborations in the future.

LOOKING AHEAD

In 2012, we plan to gather evidence from field leaders and a broad range of other sources about ELT programs, the effects of program participation on youngsters and what drives those effects. We will use what we learn to clarify and strengthen our initiative with attention to identifying important knowledge gaps and strategies to fill them. ■



Chess is one of the offerings through the expanded learning and after-school program at P.S. 186 in Brooklyn.

ARTS EDUCATION

Public school arts education, especially in city schools serving large numbers of poor young people, began a steep decline in the 1970s from which it has yet to recover. Wallace’s arts learning initiative, begun in 2005, takes as given that schools are unlikely on their own to turn that around. Our initiative seeks to find ways to bring rich arts learning experiences to disadvantaged children and teens in a variety of places – classrooms, after-school programs and the corridors of cyberspace.

Our strategy has three parts:

- Work with school districts to improve, expand and equitably distribute arts instruction.
- Help national youth organizations that already reach disadvantaged youngsters, like the Y and Boys & Girls Clubs, provide more and better arts opportunities.
- Explore the possibility of using digital technology to create substantive arts learning opportunities for teens.

OVERVIEW OF 2011 – SIGNIFICANT DEVELOPMENTS AND CHALLENGES

For our first two strategies, which center on conventional places of learning, we helped a number of organizations plan or carry out arts education efforts. For the digital strategy, we sought to learn more about the ways teens interact with the arts on the Web, in video games and with other technology to illuminate the possibilities for meaningful arts learning in new media.

Working with school districts: Launched in 2005, this is the most developed of our three strategies and is anchored by the work of Big Thought, a respected arts education nonprofit, in partnership with the Dallas Independent School District. In 2011, Big Thought was in the fifth year of support from Wallace for its arts learning effort, called Thriving Minds. This nationally-recognized initiative, with roots that go back to the 1990s, has brought together schools, teaching artists, arts organizations and others to work together to provide high-quality arts learning experiences to children in school and after-school programs.

Creating Quality *Tools for Improving Arts Education*

A highlight of the year was the launch of www.creatingquality.org, a Wallace-funded Web guide for arts instructors, principals, after-school staff members and others on how to raise the quality of arts education. The site materials are based on tools that Big Thought designed over the years in its own arts education improvement efforts. Quality is a crucial yet neglected topic among those pushing for expanded arts instruction. Indeed, the site is one of the few resources on the subject, giving guidance on matters including standards for arts learning.

Wallace supported the development of plans for improving arts education in school districts in four other cities in 2011. One of these, Boston Public Schools, is moving forward to implement its plan with a combination of Wallace and local support. Planning in another city has been slowed by turnover in the superintendent – a common challenge in all our work with school districts. A third city withdrew from consideration citing the loss of state funding for arts education. Finally, we elected not to support a plan from a fourth city, primarily because of concerns about the lack of sufficient detail in key areas including professional development for teachers and school leaders and the staff to successfully manage the project. Clearly, providing arts education in school districts remains a very challenging endeavor.

Youth Organizations: We launched this strategy in June 2011 by making grants to two of the nation’s largest youth-serving organizations – the Y and the Boys & Girls Clubs of America – so they could develop plans to expand their arts programming. The funds were to pay in part for research about teen attitudes toward arts learning. That research will serve a purpose beyond assisting the organizations with planning; its larger insights are to be turned into a report expected to be published in 2013.

Technology: We began exploring the possibilities of using digital technology to engage teens in high-quality arts experiences by commissioning a report on the subject from Kylie Pepler, an expert in media use by urban young people and an assistant professor in the Learning Sciences Program at Indiana University. We anticipate publishing the report in 2013. Staffing levels at the foundation have presented a challenge in determining how and when we will follow up on this report.

LOOKING AHEAD

We also believe our work in the arts with school districts can be enhanced by developing a “learning community” made up of Wallace grant recipients and other organizations involved in innovative efforts to strengthen arts learning. This important form of non-monetary support has been an effective tactic in our education leadership work, and we looked forward to incorporating it into Wallace’s arts education efforts, too.

Our approach to philanthropy is based on the idea that, by identifying important knowledge gaps and constructing strategies to fill them – through funding a combination of innovative work by grantees and research on the results – we can make a larger contribution to our fields of interest, in addition to the good created directly by the activities of our grantees. To be effective in this approach, we must be clear what knowledge gaps we are addressing and how our strategies hope to fill those gaps. We need to do a better job of this in our arts education work, which will be a major focus of our future efforts.■



Students learn hip-hop dance through a Thriving Minds program in Dallas.

AUDIENCE DEVELOPMENT FOR THE ARTS

Since 2006, the goal of the Wallace Excellence Awards (WEA) initiative has been to help arts organizations in selected cities design and test audience-building projects in ways that can be studied and yield lessons for the broader field. Wallace has financed work in 54 arts organizations – ranging from museums to theaters to film societies – in six cities: Boston, Chicago, Philadelphia, Minneapolis/St. Paul, San Francisco and Seattle. The initiative has also supported the establishment of “learning networks” in each city so that WEA recipients can learn from one another and spread the word to other arts groups in their communities. The grants to the arts organizations are expected to end in 2012, but research and dissemination of lessons will continue for several more years.

OVERVIEW OF 2011 - SIGNIFICANT DEVELOPMENTS AND CHALLENGES

Initiative Continues to Produce Audience Gains

WEA efforts are succeeding as a whole in boosting audience participation. Each grantee is seeking to increase the size of a particular audience segment (such as families or teens) or, in some cases, the size of its total audience. In 2011, despite a weak economy that depressed ticket sales for many arts organizations, grantees saw a 10 percent median year-over-year increase in their target audiences. This was somewhat less than the 14 percent increase from 2009 to 2010. Still, looking at cumulative gains from the time the grantees started their work to 2011, the median increase in participation has been 47 percent.

Arts organizations that sought gains within a particular audience segment (as opposed to gains among all audiences) saw the largest increases, a result that has held steady for four years. These organizations enjoyed a median increase of 17 percent in 2011, compared to 2 percent for grantees aiming for growth in their audience overall. The explanation is, in part, mathematical; it's easier to show a larger percentage increase for a smaller target group. But the finding also underscores a conclusion from a 2001 Wallace-commissioned RAND report, *A New Framework for Building Participation in the Arts*: Because factors curbing participation differ from one group of people to another, arts organizations should consider targeting population segments rather than everyone.

First publications detailing findings from WEA: A series of four case studies about WEA projects was published in paperback and online in November, leading up to a major launch in January 2012, when www.artsjournal.com, a respected Web site for arts and cultural organizations, devoted a special blog to the reports and the relationship of arts organizations to their audiences. (The blog, titled *Lead or Follow: A Debate about Leadership* <http://www.artsjournal.com/leadorfollow/our-question/>, posted observations from 15 experts in the arts.) The studies highlight successes, challenges and lessons for the field from the work of the Isabella Stewart Gardner Museum in Boston (attracting younger people to the museum); the Boston Lyric Opera (bringing families with children into the audience mix); Chicago's Steppenwolf Theatre (encouraging repeat purchases among single-ticket buyers); and the San Francisco Girls Chorus (changing the chorus image to attract more classical music patrons).

Challenges: The financial difficulties of the past several years meant that some of the organizations that received grants specifically designated for endowments during an earlier phase of the WEA were, in

spite of their best efforts, unable to meet matching requirements that had been part of the grant award. In several cases, we elected to waive these requirements. Another challenge has been, with our limited staff resources, staying in touch as well as we would like with all 54 individual organizations in the current phase of WEA. We hired external technical advisers in 2011 to assist in this process.



LOOKING AHEAD

We expect that the case studies will be of significant interest to the field, including current leaders and graduate students at university arts management programs, who can use the cases to strengthen their knowledge and skills about audience development. We are planning to produce a second round of WEA publications, both case studies and more general evaluations documenting grantees' approaches to common problems, the results achieved, and lessons for other arts organizations facing similar challenges in reaching new audiences. ■

PUBLIC OUTREACH

OVERVIEW

Generating evidence and insights on important knowledge gaps is not sufficient to drive large-scale improvement in complex social systems. We must also get that knowledge into the hands of those who can make change, and we need to make sure we present the knowledge in forms useful to them. For this reason, Wallace invests significant resources in a variety of communications efforts to disseminate what we have learned to key audiences. Examples include:

- Using our Web site, speeches and other means to share knowledge.
- Teaming up with organizations that already reach audiences important to us.
- Developing practical tools, such as guides and tip sheets, to help policymakers and those working in the field put our lessons into action.
- Generating media coverage of issues we care about to stimulate demand for solutions.

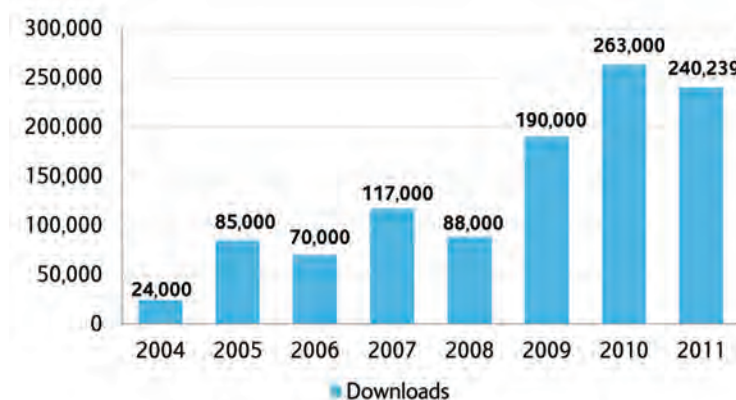
OVERVIEW OF 2011: SIGNIFICANT DEVELOPMENTS AND CHALLENGES

Web site

With more than 200,000 downloads annually, Wallace’s Web site at www.wallacefoundation.org remains our single largest vehicle to disseminate publications and other materials. In 2011, we launched a redesigned Web site, the first major update since 2004, with the aim of improving access to information and helping visitors see the connections among our strategies, knowledge products and grantees. A fall 2011 user survey found an increase from a year earlier in the percentage of readers who perceive the overall site arrangement as well-organized and simple (a jump from 63 to 75 percent); those saying it was easy to find specific content (from 63 to 72 percent); and those rating navigation as excellent (from 18 percent to 27 percent). The redesigned site also captured a silver W3 award; the awards, judged by the International Academy of Visual Arts, recognize creativity in Web design.

Web site visitors remained steady, although the story with downloads was mixed. Downloads were the second highest on record, but dropped by about nine percent from 2010, owing in part to two factors: (a) relatively few new Wallace publications posted during the first half of the year (only 7 of our 23 2011 publications were published before July) and (b) an increasingly competitive market in 2011 for online advertising.

DOWNLOADS FROM WALLACEFOUNDATION.ORG*



**This includes downloads of PDF files, use of online tools, and views of video clips, webinars and podcasts. For 2011 we moved to a calendar year count of downloads, January-December. For the years 2007-2010, we counted from November-October.*

In social media, our Twitter followers more than doubled from 1,255 at the end of 2010 to more than 2,654 at the end of 2011.

Publications

We added 23 new publications to the Web site in 2011, including four written and published by Wallace, which are important in synthesizing our perspective. Among the most significant were: Research Findings to Support Effective Policymaking; Making Summer Count; four Wallace Excellence Awards case studies; Reimagining the School Day: More Time for Learning; and Fiscal Fitness for Nonprofits. The chart below lists the most popular on our Web site; our two most downloaded publications – How Leadership Influences Student Learning (2004) and A Place to Grow and Learn (2008) – are several years old, indicating a long, desirable shelf life.

Top Ten Publications in 2011	Downloads
How Leadership Influences Student Learning (2004)	28,456
A Place to Grow and Learn (2008)	24,622
Learning From Leadership: Investigating the Links to Improved Student Learning-Full Report (2010)	5,984
Investigating the Links to Improved Student Learning-Key Findings From Wallace (2010)	4,697
Making Summer Count: How Summer Programs Can Boost Children’s Learning (2011)	4,641
Education Leadership: An Agenda for School Improvement (2010)	4,604
The Qualities of Quality: Understanding Excellence in Arts Education (2009)	3,515
Education Leadership Policy Standards ISLLC-2008 (2008)	3,251
Research Findings to Support Effective Educational Policymaking: Evidence and Action Steps for State, District and Local Policymakers (updated 2011)	3,191
Reimagining the School Day: More Time for Learning (2011)	2,630
Total	85,591

Media coverage and speaking engagements

The release of Making Summer Count generated news articles and commentary across the country, suggesting a national appetite for research on summer learning loss and possible solutions to it.

Despite a reduced staff, we more than doubled the number of outside speaking engagements, from 29 to 62. Highlights included: a Congressional briefing on Capitol Hill on school leadership; a talk on leadership at the U.S. Department of Education; a session at the Council on Foundations on learning from mistakes; and an address on after-school programming at the National League of Cities Congress of Cities convention.

LOOKING AHEAD

We plan to issue a number of major publications in the near future, including a look at the essential practices of effective principals, early observations on what we are learning from Wallace-funded summer learning efforts in six school districts, and a set of tip sheets to help those in the after-school field collect and make good use of data. ■

NEW PUBLICATIONS AND MULTIMEDIA RESOURCES FROM WALLACE

Downloadable for free at www.wallacefoundation.org

ADVANCING PHILANTHROPY

PUBLICATIONS

WALLACE'S REPORT '10: TRANSITIONS

The Wallace Foundation. Wallace's 2010 annual report describes a year of change at Wallace, with the development of new initiatives and the foundation's first presidential transition.

AFTER SCHOOL

PUBLICATIONS

THE BEACON COMMUNITY CENTERS MIDDLE SCHOOL INITIATIVE: FINAL REPORT ON IMPLEMENTATION AND YOUTH EXPERIENCE IN THE INITIATIVE

Policy Studies Associates, Inc. A study of an effort to build pre-teen after-school programs in "Beacon" centers identifies features that seem to boost chances of success.

FISCAL FITNESS FOR NONPROFITS: PROJECT PUTS CHICAGO AFTER-SCHOOL PROGRAMS AND FUNDERS THROUGH A FINANCIAL WORKOUT

The Wallace Foundation. A Wallace Story From the Field describes the foundation's effort to strengthen financial management at high-performing nonprofits that run after-school programs.

COLLECTING AND USING INFORMATION TO STRENGTHEN CITYWIDE OUT-OF-SCHOOL TIME SYSTEMS

National League of Cities. This guide offers practical advice to city leaders on using data to improve after-school programming throughout cities.

AFTERZONE: OUTCOMES FOR YOUTH PARTICIPATING IN PROVIDENCE'S AFTER-SCHOOL SYSTEM

Public/Private Ventures. One of the first rigorous evaluations of a citywide after-school initiative finds that the effort, in Providence, produced educational benefits for children.

AFTER-SCHOOL PROGRAMS FOR HIGH SCHOOL STUDENTS: AN EVALUATION OF AFTER SCHOOL MATTERS

Northwestern University. A rigorous evaluation of a nationally known high school apprenticeship program finds both successes and weaknesses in the effort.

THINK OUTSIDE THE CLOCK: PLANNERS LINK AFTER-SCHOOL PROGRAMS TO CLASSROOM CURRICULUM

Learning Forward. An article describes citywide efforts to make good after-school programs more accessible and, in some cases, link them to classroom learning.

NEW MEDIA

Video remarks by Wallace Foundation President Will Miller to the Providence After School Alliance (PASA) Open House and Report Presentation



ARTS EDUCATION

PUBLICATIONS

COLLABORATION PAINTS A BRIGHT FUTURE FOR ARTS EDUCATION

Learning Forward. An article describes a groundbreaking effort in Dallas to revive public school arts education by having schools and other groups work together.

AUDIENCE DEVELOPMENT FOR THE ARTS

PUBLICATIONS

WALLACE STUDIES IN BUILDING ARTS AUDIENCES

Bob Harlow Research and Consulting, LLC. Can an arts group cultivate bigger, different, more engaged audiences? A museum, opera company, theater and chorus undertake efforts to find out.

SCHOOL LEADERSHIP

NASBE DISCUSSION GUIDE: SCHOOL LEADERSHIP: IMPROVING STATE SYSTEMS FOR LEADER DEVELOPMENT

National Association of State Boards of Education. This set of tools is designed to help state boards of education identify ways to improve school leadership.

ISSUE BRIEF: PREPARING PRINCIPALS TO EVALUATE TEACHERS

NGA Center for Best Practices. The National Governors Association Center for Best Practices details what states can do to ensure that principals can evaluate teacher performance effectively.

THE SCHOOL ADMINISTRATION MANAGER PROJECT

Policy Studies Associates, Inc. Four studies examine a novel approach to helping school principals devote more time to instructional matters: hiring “school administration managers.”

EXECUTIVE EDUCATION FOR EDUCATORS: A VEHICLE FOR IMPROVING K-12 SYSTEMS?

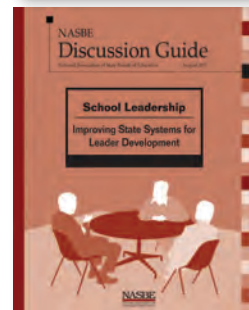
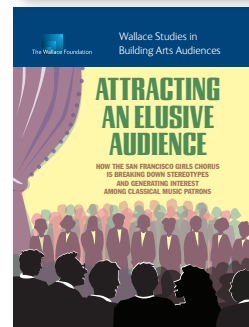
Policy Studies Associates, Inc. Two university-run executive education programs for state and local school officials offer lessons in providing training to improve state-district coordination.

STRONG LEADERS STRONG SCHOOLS: 2010 SCHOOL LEADERSHIP LAWS

National Conference of State Legislatures. The fourth annual roundup of new state laws to improve school leadership includes a new section on principal recruitment and selection.

RESEARCH FINDINGS TO SUPPORT EFFECTIVE EDUCATIONAL POLICYMAKING: EVIDENCE AND ACTION STEPS FOR STATE, DISTRICT AND LOCAL POLICYMAKERS

The Wallace Foundation. These research findings can help policymakers – federal, state and local – improve learning opportunities for children, in and out of school.



SUMMER AND EXTENDED LEARNING

MAKING SUMMER COUNT: HOW SUMMER PROGRAMS CAN BOOST CHILDREN'S LEARNING

RAND Corporation. Low-income students suffer large learning setbacks over summer vacation, but this major RAND report finds evidence that good programs can ease the problem.

SUMMER SNAPSHOT: EXPLORING THE IMPACT OF HIGHER ACHIEVEMENT'S YEAR-ROUND OUT-OF-SCHOOL-TIME PROGRAM ON SUMMER LEARNING

Public/Private Ventures. A study finds that participation in the summer part of a program for middle-school-age youngsters is linked to improved attitudes toward school.

NASBE DISCUSSION GUIDE: SUMMER LEARNING: A NEW VISION FOR SUPPORTING STUDENTS IN SUMMER PROGRAMS

National Association of State Boards of Education. This primer on summer learning loss and ways to mitigate it aims to help guide discussion by state boards of education.

REIMAGINING THE SCHOOL DAY: MORE TIME FOR LEARNING

The Wallace Foundation. At a Wallace forum, leaders in education, after-school and other areas discuss the challenges and merits of providing children with more high-quality learning time.

NEW MEDIA

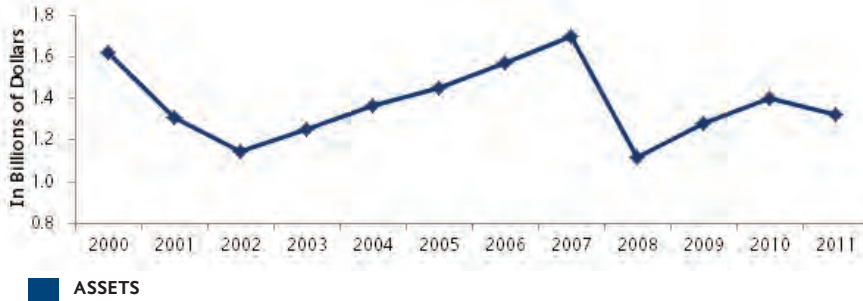
WEBINAR: STOPPING THE SUMMER SLIDE – THE ROLE THAT NETWORKS AND POLICYMAKERS CAN PLAY IN REDUCING SUMMER LEARNING LOSS

Hosted by The Wallace Foundation. This webinar looks at summer learning loss and possible remedies for it through the eyes of a RAND researcher and those working in the trenches to improve summer learning.



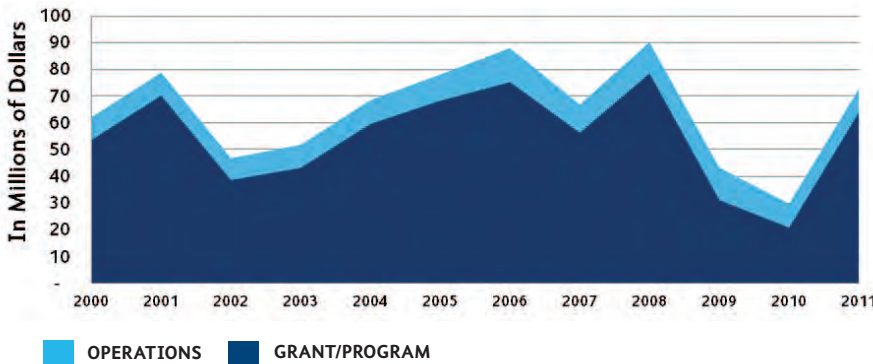
FINANCIAL OVERVIEW

INVESTMENT ASSETS



Our portfolio totaled \$1.32 billion as of December 31, 2011, which was \$67 million lower than December 31, 2010. This primarily reflected cash outflows of \$70 million in grants and expenses that we paid in 2011.

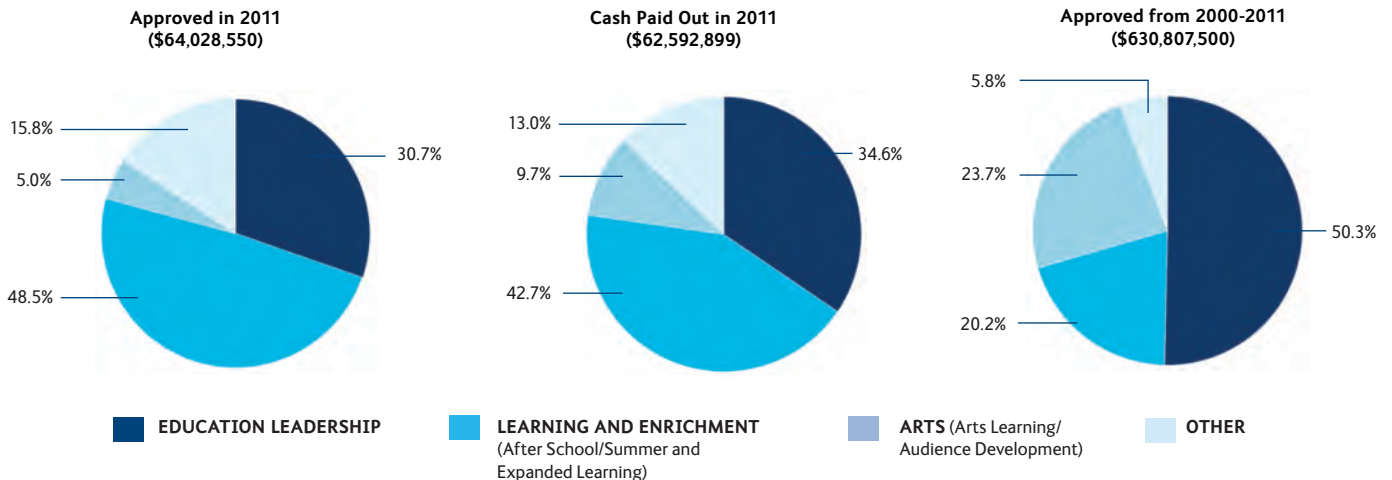
OPERATING AND GRANT/PROGRAM EXPENSES



The bulk of expenditures under “grant/program” goes to education, arts, social service and similar nonprofit organizations. Also included is spending for research and communications.

GRANT/PROGRAM EXPENSES BY FOCUS AREA

The following pie charts show spending in Wallace’s various focus areas in 2011, as well as since 2000. The charts differentiate grants approved in 2011 (which reflect initial grants in some new areas of work) from grants actually paid in 2011 (which include payments on grants approved in prior years).



PROGRAM EXPENDITURES & COMMITMENTS

The following tables describe and list the expenditures made in 2011 to advance Wallace’s work in its areas of after school, arts education, audience development for the arts, school leadership, and summer and school-year expanded learning time. In most of these areas, our approach and expenditures are grouped under two main categories: Develop Innovation Sites, and Develop and Share Knowledge.

- **DEVELOP INNOVATION SITES** — We fund and closely work with our grantees – which are usually institutions rather than individuals – to help them plan and test out new approaches to solving major public problems. These “innovation site” efforts can provide us and the broader field with insights into what works, what does not, and which conditions support or impede progress.
- **DEVELOP AND SHARE KNOWLEDGE** — Through our grantees’ work and related research we commission, we develop ideas and information that can improve both public policy and the standard practices in our fields of interest. We then use a number of different communications strategies to get the word out.



Our goal is to raise the quality of leadership by principals and other key school figures so they can improve teaching and learning in their schools.

1. DEVELOP INNOVATION SITES

These grants support Wallace’s principal pipeline initiative, which works with selected school districts to improve training and support of principals, and evaluate the results for students.

Organization / IRS name, if different (City, State)	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
THE CHARLOTTE-MECKLENBURG BOARD OF EDUCATION (Charlotte, N.C.) – To enable the Charlotte-Mecklenburg school district to take part in the pipeline initiative.	2,000,000	2,000,000	2,000,000	–
DENVER PUBLIC SCHOOLS FOUNDATION (DENVER, COL.) – To enable the Denver school district to take part in the pipeline initiative.	2,500,000	2,500,000	2,500,000	–
EDUCATION DEVELOPMENT CENTER, INC. (Waltham, Mass.) – To provide technical assistance to the principal pipeline districts.	600,000	600,000	600,000	–
THE FUND FOR PUBLIC SCHOOLS, INC. (NEW YORK, N.Y.) – To enable the New York City school district to take part in the pipeline initiative.	2,000,000	2,000,000	2,000,000	–
GWINNETT COUNTY BOARD OF EDUCATION (Suwanee, Ga.) – To enable the Gwinnett County school district to take part in the pipeline initiative.	3,900,000	3,900,000	3,900,000	–
THE NYC LEADERSHIP ACADEMY, INC. (Long Island City, NY) – To manage the initiative professional learning community.	250,000	250,000	250,000	–
PRINCE GEORGE’S COUNTY BOARD OF EDUCATION (Upper Marlboro, Md.) – To enable the Prince George’s County school district to take part in the pipeline initiative.	3,600,000	3,600,000	3,600,000	–
THE SCHOOL BOARD OF HILLSBOROUGH COUNTY, FLORIDA (Tampa, Fla.) – To enable the Hillsborough County school district to take part in the pipeline initiative.	2,800,000	2,800,000	2,800,000	–

2. DEVELOP AND SHARE KNOWLEDGE

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
AMERICAN ASSOCIATION OF SCHOOL ADMINISTRATORS, INC. (Alexandria, Va.) – To disseminate Wallace knowledge to school district leaders at forums and AASA conferences.	50,000	50,000	50,000	–
COUNCIL OF CHIEF STATE SCHOOL OFFICERS (Washington, D.C.) – To share Wallace knowledge about education leadership and expanded learning time with state chiefs through speaking engagements and other means.	225,000	225,000	225,000	–
EDUCATION DEVELOPMENT CENTER, INC. (Waltham, Mass.) – To develop guides or other materials that the field can use to boost education leadership.	100,000	100,000	100,000	–
THE EDUCATION TRUST, INC. (Washington, D.C.) – To help design outreach activities and knowledge dissemination about education leadership.	125,000	125,000	125,000	–
LEARNING FORWARD / NATIONAL STAFF DEVELOPMENT COUNCIL (Dallas, Tex.) – To develop an online guide that ties segments of the documentary The Principal Story to training topics.	100,000	100,000	100,000	–
NATIONAL ASSOCIATION OF STATE BOARDS OF EDUCATION (Alexandria, Va.) – To share Wallace knowledge about education leadership and summer learning with state board members through speaking engagements and other means.	100,000	100,000	100,000	–
NATIONAL CONFERENCE OF STATE LEGISLATURES (Denver, Col.) – To share Wallace knowledge about education leadership and summer learning with state legislators and policy advisers through speaking engagements, publications and other means.	200,000	200,000	200,000	–
NATIONAL GOVERNORS ASSOCIATION CENTER FOR BEST PRACTICES (Washington, D.C.) – To share Wallace knowledge about education leadership with governors and policy advisers through policy forums and other means.	200,000	200,000	200,000	–
THE NYC LEADERSHIP ACADEMY, INC. (NEW YORK, N.Y.) – To develop guides or other materials that the field can use to boost education leadership.	350,000	350,000	350,000	–
UNIVERSITY COUNCIL FOR EDUCATIONAL ADMINISTRATION (Charlottesville, Va.) – To develop forums and publications that help principal training program faculty members and their institutions advance their programs.	50,000	50,000	50,000	–
UNIVERSITY OF WASHINGTON, CENTER FOR THE STUDY OF TEACHING AND POLICY (Seattle, Wash.) – To develop guides or other materials that the field can use to boost education leadership.	75,000	75,000	75,000	–
POLICY STUDIES ASSOCIATES - For an evaluation of a Wallace-supported executive leadership program at Harvard and the University of Virginia.	886,053	300,000	300,000	–

3. OTHER EDUCATION PROJECTS

THE FUND FOR PUBLIC SCHOOLS, INC. (New York, N.Y.) – Matching grant, for federal Investing in Innovation grant, to assist School of One's pilot program in using technology to teach math to middle-school students.	425,000	–	212,500	–
KIPP FOUNDATION (San Francisco, Calif.) – Matching grant, for federal Investing in Innovation grant, to support scaling up KIPP's leadership development model.	2,000,000	–	1,800,000	–
OTHER RELATED EXPENSES - Consultant fees, meeting costs.	–	114,479	114,479	–

AFTER SCHOOL

Our goal is to improve the quality and availability of after-school programs in cities so that children and teens, especially those with the highest needs, attend often enough to benefit.

1. DEVELOP INNOVATION SITES

CITY-WIDE AFTER-SCHOOL SYSTEMS – These grants support efforts to develop and test coordinated, citywide approaches to increasing participation in high-quality after-school learning opportunities for children and teens.

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
AFTER-SCHOOL MATTERS, INC. (Chicago, Ill.) – To expand the capabilities of the after-school project's information technology system and to expand an effort to improve the quality of after-school programs.	3,000,000	–	400,000	–
PROVIDENCE AFTER SCHOOL ALLIANCE INC (Providence, R.I.) – To develop after-school activities that reinforce what children are learning in school, and to help improve administrative management of after-school program operators.	2,610,000	–	1,150,000	–
NATIONAL LEAGUE OF CITIES INSTITUTE (Washington, D.C.) – To help Wallace develop and implement a second round of its after-school system building initiative.	170,000	170,000	170,000	–

STRENGTHENING FINANCIAL MANAGEMENT – This effort seeks to strengthen the financial management capabilities of nonprofit organizations that provide high-quality after-school programs to children and teens in Chicago, and to study and recommend how funder/nonprofit contracting procedures and policies could be improved.

ALBANY PARK COMMUNITY CENTER, INC. (Chicago, Ill.)	65,000	25,000	45,000	–
ALTERNATIVES INCORPORATED (Chicago, Ill.)	115,000	–	40,000	–
ASSOCIATION HOUSE OF CHICAGO (Chicago, Ill.)	115,000	–	40,000	–
BETTER BOYS FOUNDATION (Chicago, Ill.)	65,000	25,000	45,000	–
BIG BROTHERS BIG SISTERS OF METROPOLITAN CHICAGO (Chicago, Ill.)	125,000	125,000	125,000	–
BUILD INCORPORATED (Chicago, Ill.)	65,000	25,000	45,000	–
CAROLE ROBERTSON CENTER FOR LEARNING (Chicago, Ill.)	125,000	125,000	125,000	–
CASA CENTRAL SOCIAL SERVICES CORPORATION (Chicago, Ill.)	65,000	25,000	45,000	–
CENTER ON HALSTED (Chicago, Ill.)	115,000	–	40,000	–
CHICAGO YOUTH CENTERS (Chicago, Ill.)	65,000	25,000	45,000	–
CHINESE AMERICAN SERVICE LEAGUE, INC. (Chicago, Ill.)	65,000	25,000	45,000	–
DONORS FORUM (Chicago, Ill.) – To establish a Chicago policy forum of government, philanthropic and nonprofit leaders to analyze and recommend improvements in funding policies, practices and conditions that affect the performance of nonprofit organizations in that city.	1,425,000	–	350,000	–
ERIE NEIGHBORHOOD HOUSE (Chicago, Ill.)	125,000	125,000	125,000	–
FISCAL MANAGEMENT ASSOCIATES (New York, N.Y.) –To provide financial management training and assistance to grantees.	3,349,000	576,498	219,000	–
GADS HILL CENTER (Chicago, Ill.)	125,000	125,000	125,000	–
GIRLS IN THE GAME (Chicago, Ill.)	125,000	125,000	125,000	–

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
INSTITUTE FOR LATINO PROGRESS (Chicago, Ill.)	115,000	–	40,000	–
LATIN WOMEN IN ACTION (Chicago, Ill.)	65,000	25,000	45,000	–
LOGAN SQUARE NEIGHBORHOOD ASSOCIATION, INC. (Chicago, Ill.)	65,000	25,000	45,000	–
METROPOLITAN FAMILY SERVICES (Chicago, Ill.)	115,000	–	40,000	–
NEIGHBORHOOD BOYS & GIRLS CLUB (Chicago, Ill.)	65,000	25,000	45,000	–
SOUTH SHORE DRILL TEAM & PERFORMING ARTS ENSEMBLE (Chicago, Ill.)	65,000	25,000	45,000	–
SOUTHWEST YOUTH SERVICES COLLABORATIVE (CHICAGO, ILL.)	65,000	25,000	45,000	–
YOUTH GUIDANCE (Chicago, Ill.)	125,000	125,000	125,000	–

2. DEVELOP AND SHARE KNOWLEDGE

AMERICAN YOUTH POLICY FORUM (Washington, D.C.) – To assist Wallace in developing a national conference on citywide after-school system building.	125,000	125,000	125,000	–
AFTERSCHOOL ALLIANCE (Washington, D.C.) – To share information on policy changes and disseminate lessons that will strengthen and support high-quality after-school services.	175,000	175,000	100,000	75,000
THE AFTER-SCHOOL CORPORATION (New York, N.Y.) – To support the Collaborative for Building After-School Systems in strategic planning, communications and other activities aimed at increasing awareness of after-school systems.	230,000	230,000	230,000	–
THE AFTER-SCHOOL CORPORATION (New York, N.Y.) – To support this organization's efforts to share information about and serve as a statewide voice for after-school system-building.	150,000	150,000	75,000	75,000
FISCAL MANAGEMENT ASSOCIATES (New York, N.Y.) – To develop online tools and “how tos” to help after-school providers improve financial management.	330,000	56,505	247,500	–
THE FORUM FOR YOUTH INVESTMENT (Washington, D.C.) – To develop a guide for municipalities on how cities can improve the quality of after-school programs citywide.	250,000	250,000	250,000	–
MASSACHUSETTS AFTERSCHOOL PARTNERSHIP (Boston, Mass.) – To support this organization's efforts to share information about and serve as a statewide voice for after-school system building.	150,000	150,000	75,000	75,000
NATIONAL LEAGUE OF CITIES INSTITUTE (Washington, D.C.) – To support efforts to encourage city leaders to implement citywide after-school systems.	200,000	200,000	200,000	–
PUBLIC/PRIVATE VENTURES (Philadelphia, Pa.) – To conduct a study about the effectiveness of financial management training for after-school providers.	775,000	–	200,000	–
UNITED WAY OF RHODE ISLAND (Providence, R.I.) – To support this organization's efforts to share information about and serve as a statewide voice for after-school system building.	150,000	150,000	75,000	75,000
VOICES FOR ILLINOIS CHILDREN, INC (Chicago, Ill.) – To support this organization's efforts to share information about and serve as a statewide voice for after-school system building.	150,000	150,000	75,000	75,000

**EXPANDED
LEARNING
OPPORTUNITIES**

Our goal is to enable city children to boost their academic achievement by spending more time engaged in high-quality learning and enrichment activities over the summer and during the school year.

1. DEVELOP INNOVATION SITES

SUMMER LEARNING – These grants are for the summer learning district demonstration, which is helping selected school districts build strong summer learning programs on a wide scale and then evaluate the results for children.

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
BIG THOUGHT (Dallas, Tex.) – To support the Dallas Independent School District's 2011 summer learning program, known as the Thriving Minds Summer Camp, and to plan for the 2012 program.	295,000	295,000	295,000	–
BOSTON AFTER SCHOOL & BEYOND, INC. (Boston, Mass.) – To support the Boston Public Schools' 2011 summer learning program, and to plan for the 2012 program.	580,000	580,000	580,000	–
CINCINNATI CITY SCHOOL DISTRICT (Cincinnati, Ohio) – To support the school district's 2011 summer learning program, known as the Fifth Quarter, and plan the 2012 program.	180,000	180,000	180,000	–
THE COMMUNITY FOUNDATION, INC. (Jacksonville, Fla.) – To support the Duval County Public School's 2011 summer learning program, known as the Superintendent's Academy, and to plan for the 2012 program.	90,000	90,000	90,000	–
DALLAS INDEPENDENT SCHOOL DISTRICT (Dallas, Tex.) – To support the Dallas Independent School District's 2011 summer learning program, known as the Thriving Minds Summer Camp, and to plan for the 2012 program.	95,000	95,000	95,000	–
NEW LEGACY PARTNERSHIP (Manchester, N.H.)-To provide technical assistance to the six districts in Wallace's summer learning demonstration.	147,000	147,000	103,840	–
PITTSBURGH PUBLIC SCHOOLS (Pittsburgh, Pa.) – To support the Pittsburgh Public School's 2011 summer learning program, known as the Summer Dreamers Academy, and to plan for the 2012 program.	430,600	430,600	430,600	–
RAND CORPORATION (Santa Monica, Cal.) – To assess six school districts' 2011 summer learning programs and provide recommendations on how to improve the programs in coming summers, and to produce a public report with lessons for the field.	2,126,000	2,126,000	1,805,000	321,000
ROCHESTER AREA COMMUNITY FOUNDATION (Rochester, N.Y.) – To support the Rochester City School District's 2011 summer learning program, known as the Summer Enrichment Program, and to plan for the 2012 program.	33,700	33,700	33,700	–
ROCHESTER CITY SCHOOL DISTRICT (Rochester, N.Y.) – To support the Rochester City School District's 2011 summer learning program, known as the Summer Enrichment Program, and to plan for the 2012 program.	710,000	710,000	710,000	–
THE SCHOOL BOARD OF DUVAL COUNTY, FLORIDA (Jacksonville, Fla.) – To support the Duval County Public School's 2011 summer learning program, known as the Superintendent's Academy, and to plan for the 2012 program.	343,000	343,000	343,000	–

SUPPORT LEADING EXPANDED LEARNING ORGANIZATIONS – These grants support leading nonprofits – multiple-city or multiple-district organizations that have demonstrated they promote the use of extra learning time over the summer or school year in ways that result in learning gains – so that they can refine and expand programming to meet demand for high-quality services.

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
THE AFTER-SCHOOL CORPORATION (New York, N.Y.) – To expand learning time and opportunities to reach more than 5,500 K-8 students in New York City, Baltimore and New Orleans.	5,000,000	5,000,000	3,000,000	2,000,000
CITIZEN SCHOOLS, INC. (Boston, Mass.) – To help Citizens Schools implement plans to work with low-performing urban public schools to add learning time during the school year.	6,000,000	6,000,000	2,500,000	3,500,000
SAY YES TO EDUCATION, INC. (New York, N.Y.) – To complete implementation of the Say Yes city-wide effort to boost education and other opportunities for young people in Syracuse, N.Y.	4,265,000	4,265,000	2,515,000	1,750,000
BUILDING EDUCATED LEADERS FOR LIFE / THE B.E.L.L. FOUNDATION, INC. (Dorchester, Mass.) – To provide general operating support to execute the organization's strategic plan.	4,000,000	–	2,200,000	–
COMMUNITIES IN SCHOOLS (Arlington, Va.) – To help capitalize and expand evidence-based programs to serve more low-income young people.	6,000,000	6,000,000	2,250,000	3,750,000
HIGHER ACHIEVEMENT PROGRAM (Washington, D.C.) – To provide general operating support and expand an evaluation of the organization's after-school and summer programs.	3,000,000	–	1,400,000	–
HORIZONS NATIONAL STUDENT ENRICHMENT PROGRAM, INC. (Norwalk, Conn.) –To support organizational growth as well as expansion of programming.	950,000	950,000	950,000	–

2. DEVELOP AND SHARE KNOWLEDGE

ACADEMY FOR EDUCATION DEVELOPMENT, INC. (Washington, D.C.) – To help Wallace plan a conference in which leaders in education, after-school programming and other areas explore the topic of reimagining the school day.	246,155	–	14,155	–
EDUCATION SECTOR, INC. (Washington, D.C.) – To write a report on Wallace's 2011 conference on reimagining the school day.	10,000	10,000	10,000	–
NATIONAL CENTER ON TIME & LEARNING, INC. (Boston, Mass.) – To help build awareness of the value of expanding the school day and school year.	250,000	250,000	250,000	–
NATIONAL SUMMER LEARNING ASSOCIATION, INC. (Baltimore, Md.) – To support a keynote address at the 2011 National Summer Learning Association national conference.	15,000	15,000	15,000	–
RAND CORPORATION (Santa Monica, Calif.) – To produce a report examining what's known about summer learning programs, their effectiveness and their costs.	635,000	–	30,000	35,000

3. OTHER SUMMER AND EXPANDED LEARNING TIME PROJECTS

HARVARD UNIVERSITY / PRESIDENT AND FELLOWS OF HARVARD COLLEGE (Cambridge, Mass.) –To support Project READS through a matching grant for the federal Investing in Innovation program.	2,000,000	–	1,170,000	–
OTHER RELATED EXPENSES - Conferences, meetings, consulting fees.	–	372,895	355,909	–

Our goal is to engage more young people in high-quality arts learning during the school day and beyond.

1. DEVELOP INNOVATION SITES

These grants help efforts in selected cities and organizations to plan or develop approaches to raising the quality and availability of arts education.

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
BIG THOUGHT (Dallas, Tex.) – To promote Thriving Minds' efforts to introduce innovations in improving the quality of arts instruction in and out of school in Dallas.	4,300,000	–	500,000	400,000
BOYS & GIRLS CLUBS OF AMERICA (Atlanta, Ga.) – To support development of a strategic plan to expand arts programming throughout its national network of clubs for young people.	449,500	449,500	400,000	49,500
COUNCIL OF CHIEF STATE SCHOOL OFFICERS (Washington, D.C.) – To manage meetings, technical assistance and a learning network for school districts participating in Wallace's arts learning initiative.	200,000	200,000	200,000	–
EDVESTORS INCORPORATED (Boston, Mass.) – To support development of plans to expand and improve arts education in Boston Public Schools.	750,000	–	50,000	–
EDVESTORS INCORPORATED (Boston, Mass.) – To support the implementation of plans to expand and improve arts education in Boston Public Schools.	260,000	260,000	260,000	–
NEXT LEVEL STRATEGIC MARKETING GROUP (Pleasantville, N.Y.) – To assist the Y and Boys & Girls Clubs of America in developing plans for expanding arts programming for the young, and to produce a public report on how to engage tweens in the arts.	926,380	212,380	206,702	–
SEATTLE PUBLIC SCHOOLS (Seattle, Wash.) – To support the development of plans to improve and expand arts education in the Seattle Public Schools.	1,000,000	1,000,000	1,000,000	–
YMCA OF THE USA / NATIONAL COUNCIL OF YOUNG MENS CHRISTIAN ASSOCIATIONS OF THE UNITED STATES OF AMERICA (Chicago, Ill.) – To support development of a strategic plan to expand arts programming throughout the Y's national network of programs for young people.	230,000	230,000	–	230,000
OTHER RELATED EXPENSES - Consultant fees	–	28,315	28,315	–

2. DEVELOP AND SHARE KNOWLEDGE

AMERICANS FOR THE ARTS, INC. (Washington, D.C.) – To sponsor the National Arts Marketing Project pre-conference session, called Unlocking Strategy with Marketing Masters.	10,000	10,000	10,000	–
THE TRUSTEES OF INDIANA UNIVERSITY (Bloomington, Ind.) – To support a report that gives an overview of innovations in digital media and learning, examines how young people use digital technology in the arts and offers options for supporting ways to increase the participation of teens in arts learning through digital media.	70,000	70,000	70,000	–

**AUDIENCE
DEVELOPMENT
FOR THE ARTS**

Our goal is to get more people more deeply involved in the arts so they may reap the rewards of engaging with art.

1. DEVELOP INNOVATION SITES

The Wallace Excellence Awards support exemplary arts organizations in selected cities to test practices for building participation in the arts.

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
EXPERIENCE MUSIC PROJECT/SCIENCE FICTION MUSEUM AND HALL OF FAME / EXPERIENCE LEARNING COMMUNITY (Seattle, Wash.)	585,000	–	160,000	–
MACPHAIL CENTER FOR MUSIC (Minneapolis, Minn.)	750,000	–	100,000	–
THE MINNEAPOLIS INSTITUTE OF ARTS / THE MINNEAPOLIS SOCIETY OF FINE ARTS (Minneapolis, Minn.)	750,000	–	100,000	–
THE MINNESOTA OPERA (Minneapolis, Minn.)	750,000	–	100,000	–
MINNESOTA ORCHESTRA (Minneapolis, Minn.)	750,000	–	200,000	–
MIXED BLOOD THEATRE COMPANY (Minneapolis, Minn.)	300,000	–	50,000	–
NORTHERN CLAY CENTER (Minneapolis, Minn.)	500,000	–	100,000	–
ON THE BOARDS (Seattle, Wash.)	750,000	–	185,000	–
ONE REEL (Seattle, Wash.)	560,000	–	50,000	–
ORDWAY CENTER FOR THE PERFORMING ARTS (Saint Paul, Minn.)	750,000	–	150,000	–
PACIFIC NORTHWEST BALLET / Pacific Northwest Ballet Association (Seattle)	750,000	–	62,000	–
S. RADOFF ASSOCIATES (New York, N.Y.) – To provide technical assistance to all 54 Wallace Excellence Awards arts organizations from 2008-2011.	1,255,000	381,400	381,400	–
THE SAINT PAUL CHAMBER ORCHESTRA SOCIETY (Saint Paul, Minn.)	750,000	–	150,000	–
SEATTLE ART MUSEUM (Seattle, Wash.)	750,000	–	150,000	–
SEATTLE OPERA (Seattle, Wash.)	750,000	–	215,000	–
SEATTLE REPERTORY THEATRE (Seattle, Wash.)	750,000	–	70,000	–
SEATTLE YOUTH SYMPHONY ORCHESTRAS (Seattle, Wash.)	500,000	–	125,000	–
SIFF (Seattle, Wash.)	750,000	–	180,000	–

2. DEVELOP AND SHARE KNOWLEDGE

MINNESOTA COMMUNITY FOUNDATION (Saint Paul, Minn.)	1,600,000	–	250,000	50,000
ORGANIZATIONAL SERVICES, INC. (Ann Arbor, Mich.) - To work with Wallace on a conference for the Wallace Excellence Awards grantees, held in Chicago.	364,282	364,282	364,282	–
THE PHILADELPHIA FOUNDATION (Philadelphia, Pa.)	1,900,000	–	200,000	–
SAN FRANCISCO FOUNDATION (San Francisco, Calif.)	1,470,000			50,000

COMMUNICATIONS GRANTS

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
EDITORIAL PROJECTS IN EDUCATION, INC. (Bethesda, Md.) – To support print and Web coverage of education leadership, after-school, arts learning, and summer and expanded learning.	1,000,000	1,000,000	1,000,000	–
LEARNING FORWARD / NATIONAL STAFF DEVELOPMENT COUNCIL (Dallas, Tex.) – To disseminate Wallace knowledge through conferences and other communications vehicles to bring greater national focus to education leadership and expanded learning.	125,000	125,000	125,000	–
LEARNING MATTERS, INC. (New York, N.Y.) – To support television and Web coverage of education leadership, after-school, arts learning, and summer and expanded learning.	700,000	700,000	700,000	–
NATIONAL PUBLIC RADIO, INC. (Washington, D.C.) – To support coverage of arts and education issues.	750,000	750,000	750,000	–
OTHER RELATED EXPENSES - Publications, sponsorship, presentation, meetings and consulting fees.	–	500,301	542,667	–

SERVICES TO THE FIELD OF PHILANTHROPY

THE CENTER FOR EFFECTIVE PHILANTHROPY, INC. (Cambridge, Mass.) – For general support of this nonprofit organization, which provides data and insights to help philanthropies better define, assess and improve their effectiveness.	350,000	350,000	350,000	–
THE COMMUNICATIONS NETWORK (Naperville, Ill.) – For general operating support of this nonprofit membership organization, whose mission is to provide resources, guidance and leadership to advance the strategic practice of communications in philanthropy.	10,000	10,000	10,000	–
COUNCIL OF CHIEF STATE SCHOOL OFFICERS (Washington, D.C.) – To support the work of the Arts Education Partnership to advance arts learning for children.	25,000	25,000	25,000	–
COUNCIL ON FOUNDATIONS, INC. (Arlington, Va.) – For general operating support of this national, nonprofit membership organization for grantmakers.	49,500	49,500	49,500	–
FJC (New York, N.Y.) – To support the 2011 program activities of the New York City Youth Funders Network.	3,000	3,000	3,000	–
THE FOUNDATION CENTER (New York, N.Y.) – To support this national clearing-house of information on private grantmaking.	350,000	350,000	350,000	–
FOUNDATION FINANCIAL OFFICERS GROUP, INC. (Chicago, Ill.) – For general support of this national nonprofit member organization whose mission is to assist in the continuing education of its members and provide opportunities for networking to further their development as investment and financial professionals.	5,000	5,000	5,000	–

	TOTAL GRANT/ CONTRACT AMOUNT	APPROVED 2011	PAID 2011	FUTURE PAYMENTS
GRANTMAKERS FOR EDUCATION (Portland, Ore.) – For general support of this organization of private and public philanthropies that support improved education for students from early childhood through higher education.	49,500	49,500	49,500	–
GRANTMAKERS IN THE ARTS (Seattle, Wash.) – For general support of this nonprofit membership organization, which seeks to advance the use of philanthropic funding for arts and culture.	22,000	22,000	22,000	–
INDEPENDENT SECTOR (Washington, D.C.) – For general operating support of this nonprofit organization, whose mission is to advance the common good by strengthening the nonprofit and philanthropic community.	7,500	7,500	7,500	–
NATIONAL GUILD FOR COMMUNITY ARTS EDUCATION, INC. (New York, N.Y.) – For general operating support of this national service organization for community arts education providers.	25,000	25,000	25,000	–
NATIONAL PUBLIC EDUCATION SUPPORT FUND (Washington, D.C.) – For general support of the Education Funder Strategy Group.	25,000	25,000	25,000	–
NONPROFIT COORDINATING COMMITTEE OF NEW YORK, INC. (New York, N.Y.) – For general operating support of this nonprofit, which serves some 1,700 nonprofits in New York City, Long Island and Westchester County.	3,000	3,000	3,000	–
PHILANTHROPY NEW YORK, INC. (New York, N.Y.) – For general operating support of the principal professional community of philanthropic foundations in the New York City area.	24,350	24,350	24,350	–
PUBLIC/PRIVATE VENTURES (Philadelphia, Pa.) – To support the activities of the Evaluation Roundtable.	50,000	50,000	50,000	–
OTHER RELATED EXPENSES - Service to the field organizations' dues.	–	22,150	22,150	–

OTHER GRANTS

HARLEM CHILDREN'S ZONE (New York, N.Y.) To co-invest with the Edna McConnell Clark Foundation and other donors in a funding collaborative to sustain the services of the organization.	5,000,000	5,000,000	3,000,000	2,000,000
MUSEUM OF FINE ARTS, HOUSTON (Houston, Tex.) – To support the purchase of a work of art in memory of longtime Wallace board member Peter C. Marzio, who died in 2010 and served as director of the Museum of Fine Arts, Houston, for almost 30 years.	500,000	500,000	500,000	–
TRIANGLE COMMUNITY FOUNDATION (Durham, N.C.) – To honor retiring Wallace Foundation President M. Christine DeVita by creating a field-of-interest fund known as the Wallace Fund for Youth to benefit youngsters in the Triangle region of North Carolina through grants, research and convenings in the community.	500,000	500,000	500,000	–
REFUNDED GRANTS	–	(232,111)	–	–
EMPLOYEE MATCHING GIFTS	–	17,806	21,850	4,900

GRAND TOTAL

110,790,520	64,028,550	62,592,899	14,515,400
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The Wallace Foundation®

Supporting ideas.
Sharing solutions.
Expanding opportunities.®

Our vision is that children, particularly those living in distressed urban areas, have access to good schools and a variety of enrichment programs in and outside of school that prepare them to be contributing members of their communities. Our mission is to improve learning and enrichment opportunities for children. We do this by supporting and sharing effective ideas and practices.

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