

Wallace 

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REPORT

23



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# THE YEAR IN REVIEW, 2023: CHARTING NEW PATHS, EXPLORING NEW MODELS

2023 was a year of exploration and learning for Wallace. At the forefront of our efforts to learn more about our areas of work were our “model development initiatives.” We design these initiatives to help better understand a problem so we can develop possible solutions that we could test in subsequent initiatives.

Model development efforts continued in two of our three focus areas. In school leadership, our Equity-Centered Pipeline Initiative entered its third year. In the arts, we began the second year of a new initiative focused on how arts organizations rooted in communities of color define and enhance their well-being.

In our third focus area, youth development, we launched the exploratory phase of a new initiative focused on marginalized adolescents. We are partnering with 30 nonprofit, government, and other institutions that will inform our design of a full initiative down the road.



Top row photos by Jacob Cantrell. Bottom row left by Sarosh Syed. Bottom row right by Robert Banez.

# EFFORTS IN OUR THREE INTEREST AREAS

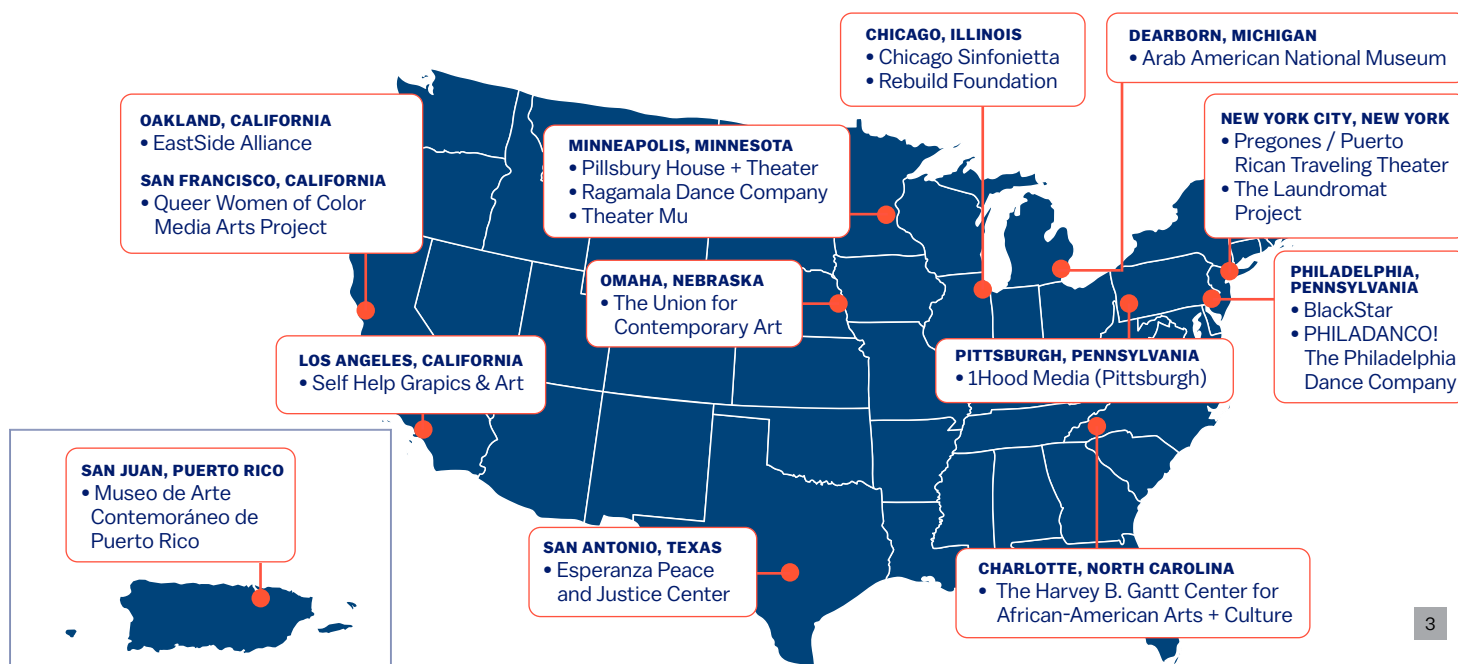
## Arts

The Advancing Well-Being in the Arts initiative continued apace. The initiative supports arts organizations around the country that are rooted in communities of color. It seeks to learn how such organizations work toward their own well-being and that of their communities.

We designed the initiative to work with three cohorts of grantees. The first is a group of 18 large organizations with annual budgets of \$500,000 or more (see map). These organizations are undertaking projects to strengthen their work and their ties to their communities. The Social Sciences Research Council, an independent nonprofit that oversees social science research internationally, has been placing researchers with organizations in the first cohort to document each organization's history and improve understanding of its work. The council matched researchers with 11 of the organizations in the cohort in 2022. Additional researchers began work with the seven remaining organizations in 2023. We expect to publish the results of the researchers' work when completed.

The second cohort is a group of organizations that will funnel funds to organizations with annual budgets of less than \$500,000. Most arts organizations rooted in communities of color are smaller than the organizations in the first cohort. This second cohort will enable Wallace to support organizations that are more representative of the sector and to learn more about their work. We identified two networks of intermediary organizations to select the smaller organizations and disburse funds to them. The first is a group of six regional arts organizations established in the 1970s by the National Endowment for the Arts and state arts organizations to help manage national initiatives. The second, which is being assembled, consists of arts service organizations that support arts organizations rooted in communities of color. Researchers will explore the strategies both networks use to direct support to the organizations that most need it.

The third cohort funds research efforts proposed by organizations in the field. Dozens of arts service organizations, community-based arts organizations, and arts researchers began submitting proposals for studies on questions of importance to them and to the sector at large. We funded 19 in 2023 and expect to fund several more in 2024.





## Youth Arts

Wallace's Youth Arts Initiative, our most recent effort in arts education, ended in 2023. It supported the Boys & Girls Clubs of America as it worked to provide a meaningful arts education—increasingly absent in public schools—through its affiliated clubs.

Two studies of the programs, [one released in 2017](#) and [the other in 2018](#), found that clubhouses could incorporate principles of successful arts programs and that students liked the new programs. But the effort cost more than \$10 million, too large a sum for most organizations. The initiative ended in 2023 with a third study, [\*Setting the Stage: Practical Ideas for Implementing High-Quality Afterschool Arts Programs\*](#), that explores ways to make effective arts education programs affordable. The study, released by Research for Action and McClanahan Associates, finds that three elements helped five clubhouses establish promising arts learning experiences: professional teaching artists, high-quality equipment, and dedicated spaces to practice and perform. Cash-strapped programs, researchers suggest, could benefit from focusing on such high-return investments.

As one initiative ends, research projects we commissioned are helping us chart new directions in youth arts. [\*The Connected Arts Learning Framework: An Expanded View of the Purposes and Possibilities for Arts Learning\*](#), a study led by researchers at the University of California, Irvine, explores how arts education and students' personal interests and experiences reinforce each other. The team began with the "connected learning framework," a research-based framework to help create meaningful learning experiences based on young people's interests and then connect these experiences to real-world issues and communities. It reviewed literature on youth arts and interviewed practitioners to explore how that framework could apply to the arts. The team found that arts education in this context can help young people build connections with their culture, identities, communities, and future aspirations.



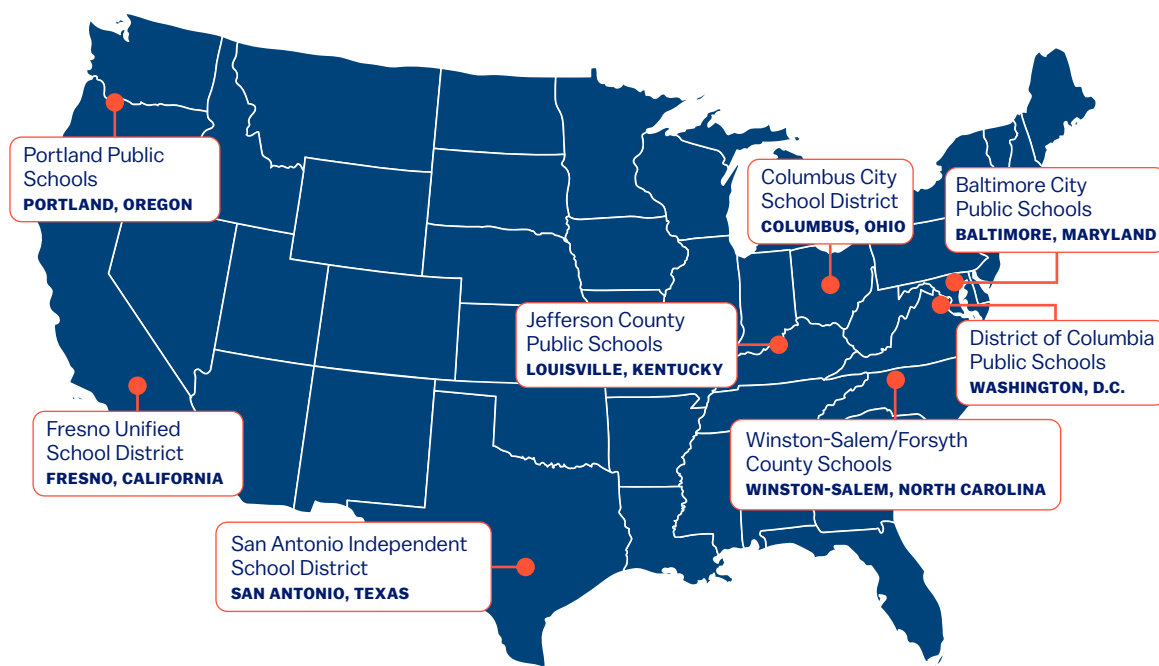
Photos by Melissa Rogers.

## School Leadership

The eight districts (see map) participating in Wallace's Equity-Centered Pipeline Initiative (ECPI) began their third year of work in 2023. The initiative supports districts as they collaborate with universities and state agencies to develop principals who can ensure all students can learn and achieve. Districts continued to develop their visions for what equity looks like in their schools and how school leaders could implement those visions. They also continued creating “logic models” for their work—diagrams that plot out hoped-for outcomes of a district’s effort and the steps necessary to achieve them.

A new development in 2023 was the formation of two new research collaborations to help measure progress toward cultivating leaders who can meet the needs of all students. The first focuses on practical measures. Districts are working with researchers to develop, test, and refine ways to “take the pulse” of implementation activities to measure whether and how changes are happening on the ground. For example, staffers involved in hiring practices might complete a three-question survey after each interview with a leadership-job applicant. Results would help identify whether and how the interview processes integrated the district’s new approaches to improve outcomes for all the students they serve.

The second research collaboration focuses on the development of “equity” indicators. Districts are working with researchers from the University of Wisconsin and Columbia University’s Teachers College to analyze publicly available datasets that can be used to show progress in implementing pipelines designed to develop leaders who can meet the needs of all students. These measures might include, for example, greater teacher retention, higher attendance rates, fewer disciplinary actions, and other metrics that might be meaningful to school boards and other stakeholders.



## Publications

In June, we released the [\*Principal Pipeline Toolkit\*](#), a set of seven tools and guides that can help school districts develop large corps of effective school leaders. The toolkit covers such topics as federal funding for principal pipelines, pre-service training for aspiring leaders, and supports that could help assistant principals step into the principal's job.

Also in June, we published Vanderbilt University's [\*Planning and Developing Principal Pipelines: Approaches, Opportunities, and Challenges\*](#), which offers further considerations for districts. It emerged from Wallace's Principal Pipeline Learning Community, an initiative that ran from 2019 to 2023 and brought together more than 80 school districts interested in building or strengthening comprehensive, aligned principal pipelines. Researchers surveyed representatives from those districts. Their results pointed to several barriers to the districts' work and highlighted strategies that helped overcome them. Among the successful strategies were: a core team of central office staffers charged with running pipelines; good communication and collaboration between the central office units doing the pipeline work; and superintendent support and stability.

[\*A Culturally Responsive School Leadership Approach to Developing Equity-Centered Principals: Considerations for Principal Pipelines\*](#) ponders whether principal pipelines could help ensure all students get the support they need to learn and achieve. Six scholars draw from an influential framework that describes key characteristics of equity-centered school leaders, and map those characteristics to seven "domains" of comprehensive, aligned principal pipelines (see infographic). One characteristic of equity-centered leaders, for example, is that they create inclusive environments where everyone is welcome. The authors suggest that principal training programs—key players in one of the seven domains—could help instill this skill in future school leaders.



## Youth Development

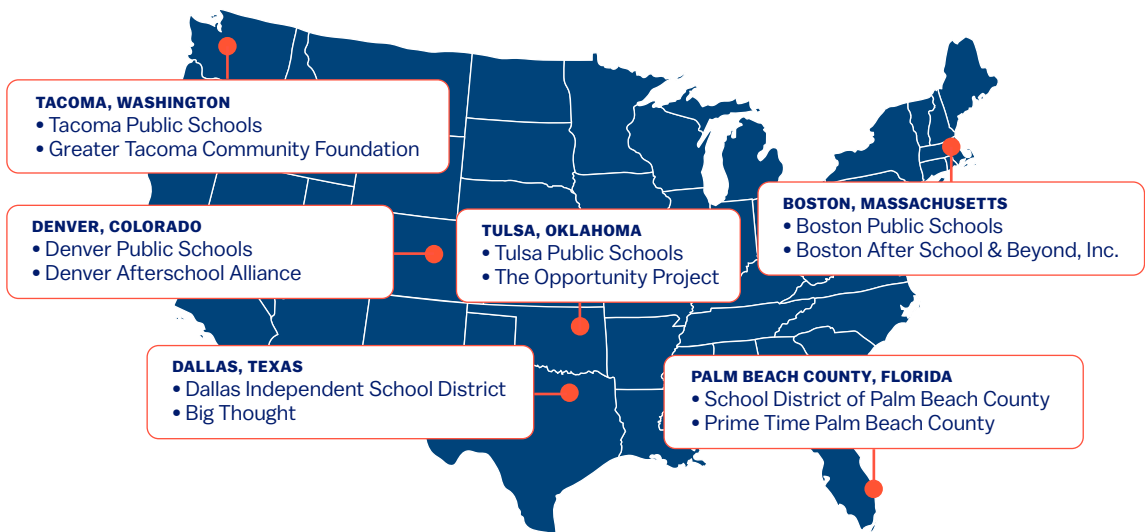
Our work in youth development progressed on four fronts.

First, we saw the completion of field work in Wallace's Partnerships for Social and Emotional Learning Initiative. That initiative supported partnerships between elementary schools and afterschool programs in six communities around the country (see map). Collaborations sought to help children develop life skills such as empathy, persistence, and teamwork.

Second, we continued to explore options for future directions in youth development. Advancing Opportunities for Adolescents is supporting 30 cross-sector partnerships throughout the nation working to increase young people's access to high-quality out-of-school-time programs. Each partnership focuses on middle and high school-aged youth and brings together public and private organizations working in areas ranging from education to youth development to community health services. In one endeavor, for example, an economic development organization is working with its mayor's office, a local college, and others to turn vacant storefronts into education and career centers for youth. We intend to complete work on the project in 2024 and launch an initiative based on its insights in 2025.

Third, the Wallace-convened District Summer Learning Network continued to help school districts nationwide plan and run evidence-based summer learning programs. The network, which is led by research nonprofit FHI360, has brought together more than 100 school districts from around the country. These districts are working together to put in place policies and practices grounded in Wallace-commissioned research. New York University's MetroCenter, a research organization, is studying and documenting their work. We hope the effort will help demonstrate how districts around the country use insights from Wallace's summer learning initiatives.

Finally, Wallace continued to support the Texas Education Agency as it worked to develop high-quality summer learning programs. Major education reforms in Texas in 2019 made available state funds to increase the number of instructional days in the school year. Wallace seized the opportunity to support summer programs, which received many of these funds, as they worked to implement evidence-based practices, many of which emerged from Wallace initiatives. Districts participating in the effort completed their third year of work in 2023. We expect to continue supporting them until 2026.





## Publications

Wallace's Partnerships for Social and Emotional Learning Initiative produced insights out-of-school-time providers and intermediaries could use to incorporate social and emotional learning into their programming. A RAND Corporation research team pored through extensive sets of data from the more than 100 out-of-school-time programs that participated in the initiative. Its report, *[Skills for Success: Developing Social and Emotional Competencies in Out-of-School-Time Programs](#)*, summarizes the approaches programs adopted and offers recommendations for other out-of-school-time efforts. Programs featured in the report were invited to speak at several conferences, including those held by the National Afterschool Association, The Forum for Youth Investment, and Every Hour Counts. Future publications will share additional lessons from the initiative.

Another publication, *[A National Call to Action for Summer Learning: How Did States Respond?](#)*, documented how states used summer programs to make up for learning time lost to the pandemic. Researchers at Westat interviewed state education officials and analyzed their plans to determine what they did and how their work could inform summer learning efforts beyond the pandemic. We also released *[Seeds of Success](#)*, a short documentary that shows how an afterschool program in Tulsa is working to build students' confidence, increase motivation, and equip students with skills to succeed in the classroom and beyond.



Photos by Melissa Rogers.

# DISSEMINATION OF INFORMATION AND IDEAS

Wallace took a major step forward in our communications efforts in 2023 with the launch of a new website to help put in place a new content strategy we adopted last year.

The Wallace Foundation has long worked to convey insights generated from our initiatives, typically in the form of weighty research reports, to practitioners and policymakers. In 2023, we began a new push to build on those reports and deliver information in accessible formats for non-academic audiences. We also responded to changes in media consumption by increasing our use of multimedia tools, including text, audio, and video, to meet our audiences where they are.



## SUMMARY OF THE REPORT

### SUMMARY

How we did this

Major disruptions to school-year education during the COVID pandemic led to learning losses for many K-12 students. To counter the problem, the federal government sought to expand summer learning programming. State education agencies (SEAs) played a key role in making this happen. What did their work look like? And what are lessons for how states can foster high-quality summer learning beyond the pandemic?

This report from the Wallace research organization helps answer these questions. It is the second in a series produced under Westat's National Summer Learning and Enrichment Study.

## MAIN POINTS

### KEY TAKEAWAYS

- A majority of states envisioned and defined a new role for themselves in response to the summer learning call to action.

## CHARTS AND INFOGRAPHICS

### VISUALIZATIONS



## RELATED MATERIALS

### MATERIALS & DOWNLOADS

View the Slide

How states used the four key levers to make choices about summer learning and enrichment

Explore the Summer Learning Toolkit

Evidence-based tools and guidance for delivering effective programs

# NEW PUBLICATIONS AND MULTIMEDIA RESOURCES FROM WALLACE

Downloadable for free at [www.wallacefoundation.org](http://www.wallacefoundation.org)

## SCHOOL LEADERSHIP

*Principal Pipeline Toolkit*. Seven tools can help school districts build and sustain a comprehensive principal pipeline. Among the topics covered: Improving pre-service training for aspiring leaders; ensuring assistant principals can step into the principal's job; and tapping federal funding for the work.

*Planning and Developing Principal Pipelines: Approaches, Opportunities, and Challenges*. A study of school system efforts to strengthen the principalship offers lessons for districts. One takeaway: It helps to have a core team in the central office in charge of the work.

*A Culturally Responsive School Leadership Approach to Developing Equity-Centered Principals: Considerations for Principal Pipelines*. How could school districts construct principal pipelines that produce school leaders who advance equity in education? A team of scholars offers ideas.

*Assistant Principal Advancement to the Principalship: A Guide for School Districts*. This guide can help school districts that want to examine and improve how they prepare assistant principals for the principal's job.

## YOUTH DEVELOPMENT

*Skills for Success: Developing Social and Emotional Competencies in Out-of-School-Time Programs*. This report offers guidance to out-of-school-time providers and intermediaries looking to incorporate social and emotional learning into their programming.

*Expanding Equity in Afterschool and Summer Learning: Lessons From School Districts*. School districts committed to classroom equity have sought to focus on equity in their out-of-school-time programs, too, but they face challenges.

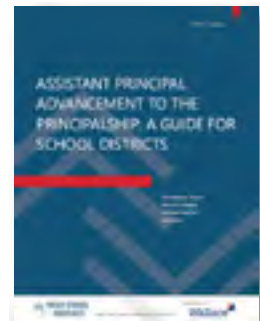
*A National Call to Action for Summer Learning: How Did States Respond?* Spurred by unprecedented federal funding and a national call to counter covid-related learning loss, states mobilized in 2021 to support school district summer learning efforts.

*Beyond the Classroom Podcast*. In a three-part podcast, researchers and practitioners discuss the findings from a student-led study on improving out-of-school-time.

*Seeds of Success*. A short documentary shows how the Tulsa Public School District is taking a new approach, equipping students with tools to achieve success in and out of the classroom.

## YOUTH ARTS

*The Connected Arts Learning Framework: An Expanded View of the Purposes and Possibilities for Arts Learning*. This report offers a framework for arts learning that connects the arts to children's community, civic, and future professional life.



[How Connected Arts Learning Can Expand Our View of the Impacts of Arts Education.](#)

This brief summarizes an article in Review of Research in Education seeking to expand arts learning outcomes for both students and communities.

[Don't Dictate, Collaborate: Achieving Equity in Arts Education.](#) This brief summarizes an article in Arts Education Policy Review offering recommendations for policymakers based on what works in arts learning.

[Setting the Stage Practical Ideas for Implementing High-Quality Afterschool Arts Programs.](#) This report highlights promising approaches, how to cut costs, and make programs available to more young people.

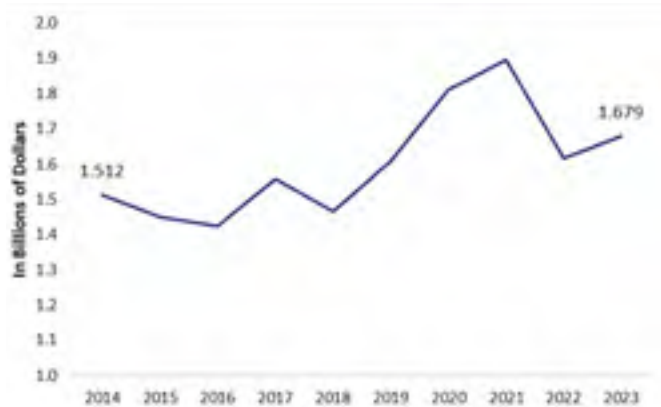




## FINANCIAL OVERVIEW

# FINANCES 2023

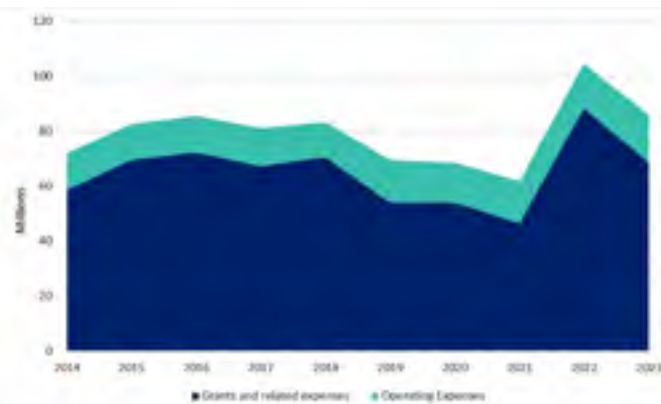
### INVESTMENT ASSETS



Our endowment totaled \$1.674 billion on December 31, 2023, which was \$58 million more than our portfolio of \$1.616 billion on December 31, 2022. The increase reflects the net market appreciation of our investments after deducting grants and expenses of \$85.4 million paid in 2023.

Our portfolio value on December 31, 2023 was \$162 million higher than our assets of \$1.512 billion on December 31, 2014, on a nominal basis. We paid a total of \$794.5 million in grants and expenses over that 10-year period.

### WALLACE'S EXPENSES OVER A DECADE

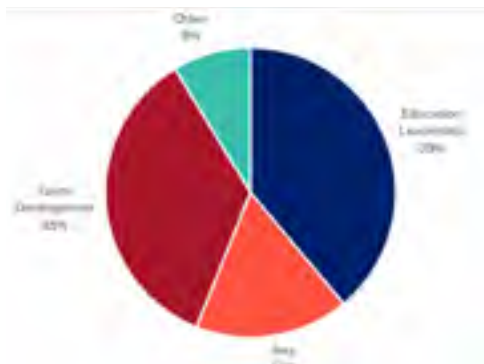


The bulk of expenditures under “grants and related expenses” goes to education, arts, social service, and similar nonprofit organizations. Also included is spending for research and communications. This chart reflects expenses on an accrual basis, meaning expenses are reported in the year they are incurred, which is not necessarily the year in which the expenses are paid.

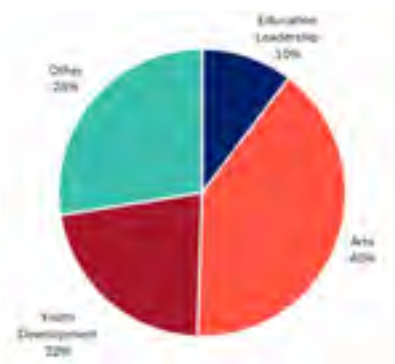
### GRANT/PROGRAM EXPENSES BY FOCUS AREA

The pie charts below show spending, by percentage, in Wallace’s areas of interest. The first shows program grants and expenses approved in 2023; the second shows grants/expenses paid in 2023 (including grants approved in earlier years); the third shows the total grant amounts approved since 2014.

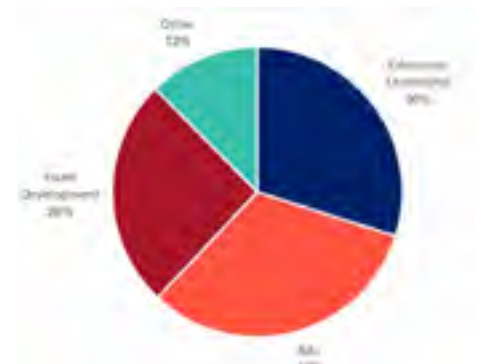
Approved in 2023



Cash Paid Out in 2023



Approved from 2014 to 2023







Our mission is to help all communities build a more vibrant and just future by fostering advances in the arts, education leadership, and youth development.

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