

REPORT 2021



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Designed by José Moreno

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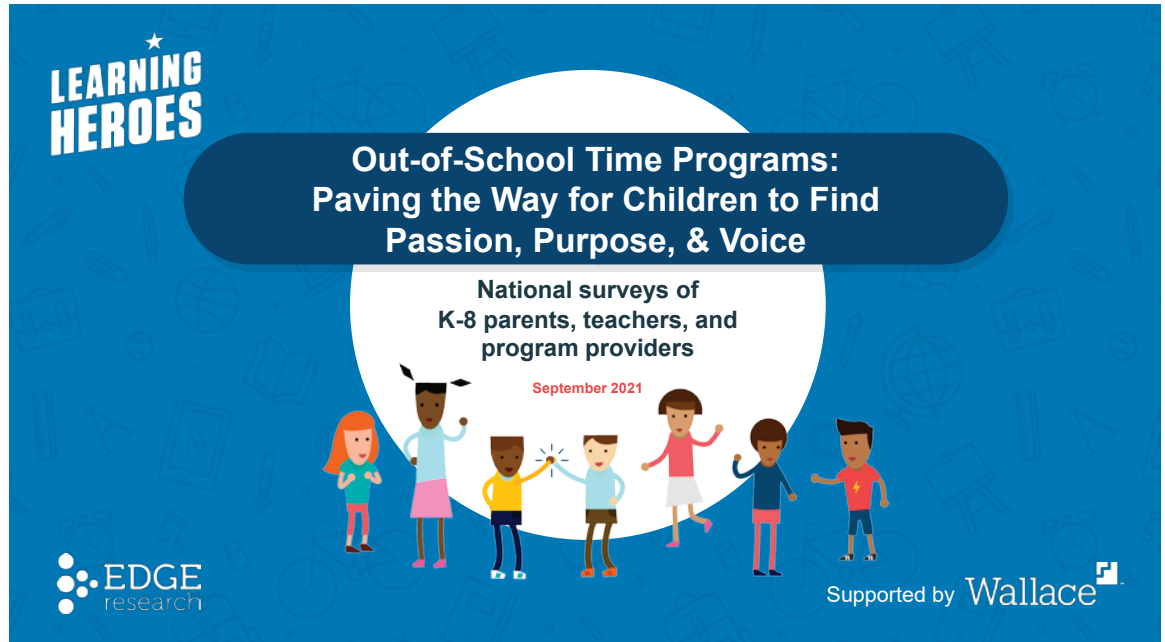
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YEAR IN REVIEW, 2021: ADJUSTING TO LIFE DURING A PANDEMIC

A survey on views of afterschool, summer and other out-of-school-time programs found concern about the pandemic's impact on children's academic and social-emotional well-being.



Vaccines and new treatments notwithstanding, COVID-19 remained very much a presence in 2021, so like many other institutions The Wallace Foundation developed a modus operandi of adjustment. In other words, we learned to live with the pandemic's twists and turns.

Wallace responded to the extraordinary needs created by the pandemic, while continuing to support grantees and launch new efforts.

In Wallace's three areas of interest—the arts, learning and enrichment, and school leadership—the foundation tried to do two things. One was to continue to respond to the extraordinary needs created by the pandemic. The second was to take stock and proceed wherever possible with the “ordinary,” that is, the foundation's central business of supporting grantees, managing ongoing initiatives and launching new efforts to advance our mission of fostering equity and improvements in learning and enrichment for young people, and in the arts for everyone.

Covid response

The pandemic did not leave any of our focus areas untouched. In education, COVID initially led to mass classroom shutdowns and, later, off-again, on-again hybrid instruction. As time went on, it became increasingly clear that for many young people, remote learning was not an adequate substitute for the in-person kind. Those running summer, afterschool and other out-of-school-time efforts, meanwhile, faced a squeeze. Programs were more needed than ever as a way to help children and families cope with the pandemic, but program providers found themselves competing for needed staff members when better-paying service-industry jobs opened up. For its part, the arts sector saw multiple rounds of seesawing between reopening and cancelling events, postponing or closing.



A popular post on Wallace's blog in 2021 was an analysis of the education provisions of the federal American Rescue Plan Act, which allotted more than \$126 billion for K-12 schools.

Our response, supported by more than \$10 million in funding designated for COVID efforts, was twofold.

First, we introduced projects to help our areas of interest manage the pandemic realities they were facing. Among our efforts was the establishment of forums in which school district officials and others could learn and share information about how to spend the influx of federal COVID relief dollars into their locales on evidence-based efforts to bolster education. Our American Rescue Plan Strategic Planning Learning Community has been assisting 78 school districts and is focused on, among other things, effective school leadership. The District Summer Learning Network, focusing on how to prepare and run high-quality summer learning programs, got off the ground with an initial set of 45 school districts seeking to make plans for summer 2022.

Second, as an institution dedicated to generating information and ideas, we issued a raft of materials to offer guidance on navigating the crisis. More than one-third of the 24 new reports, videos and other resources posted on Wallace's website in 2021 were either wholly or partially devoted to COVID response. They ranged from a series of online conversations about the possible future contours of the arts to a set of briefs, for school districts, afterschool programs and other institutions, on considerations for planning for COVID recovery and reopening.

Efforts in our three interest areas

The pandemic did not distract the foundation from pursuing its more conventional work of developing and carrying out efforts to help solve problems in the sectors we serve. Indeed, the year saw the kick-off of two major initiatives, one in the arts, the other in school leadership. Both were very much in sync with the foundation's mission statement, revised in 2020 to call out explicitly the idea of "equity" that had long been implicit in Wallace's work. Implementation of our major learning and enrichment initiative—focusing on children's social and emotional learning—continued, albeit with some shifts in response to pandemic needs. In addition, work to plan for a new learning and enrichment initiative got under way. ■



ARTS

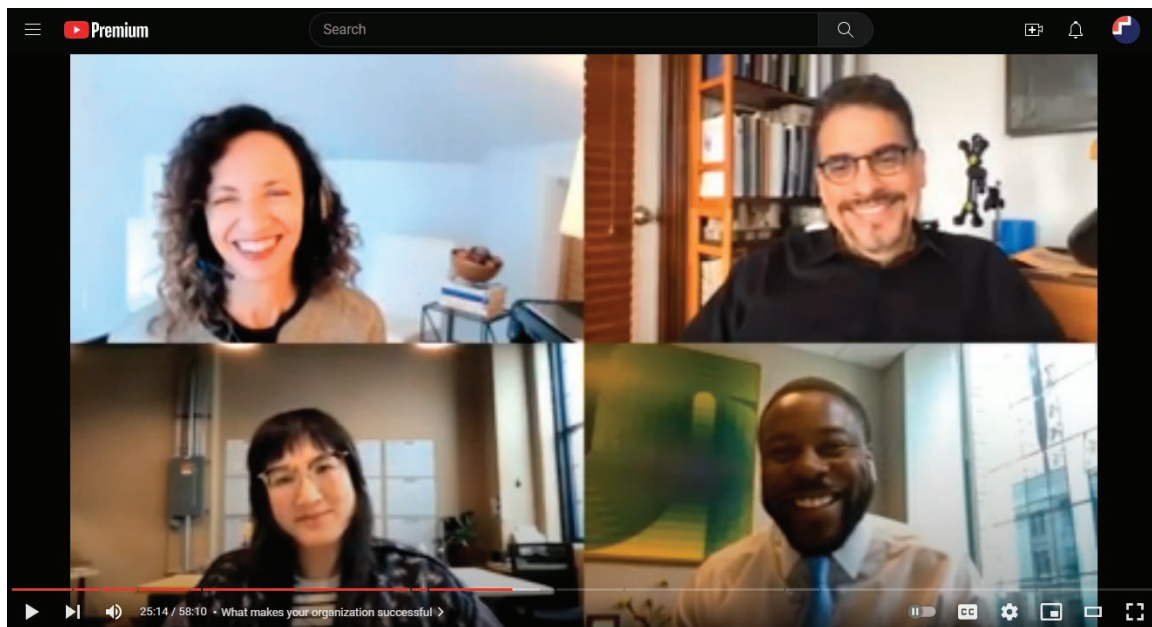
The highlight of 2021 in Wallace’s arts work was the announcement mid-year of a five-year initiative focused on how arts organizations founded by, for and with communities of color create and activate strategies for enhancing their organization’s well-being. That’s a bare-bones description of a venture whose final form, decided on in fall 2021, was a \$100 million initiative to involve dozens of arts organizations and related institutions.

It was an effort that took shape only after much reflection and rethinking at the foundation based on what we were hearing and learning from the field. Wallace conducted a literature review and commissioned market research about arts organizations of color, and, perhaps most important, engaged in extended and sometimes difficult conversations with the field, including arts service organizations of color. Wallace had had only limited experience in this sector, and we learned that working in partnership with arts organizations of color, many of which have felt underappreciated and underfunded, required bridge-building. This was especially true given skepticism in the field about the intentions and motives of national funders after the anti-racism protests of 2020. In short, we have to work to foster relationships and develop trust.

Wallace announced a five-year effort focused on learning from arts organizations founded by, with and for communities of color.

Another factor weighed into our thinking, too: evidence that arts organizations of color have, on average, smaller budgets than other arts groups—and, thus, are at a distinct disadvantage when large national foundations like Wallace restrict their grant-giving to organizations with relatively large budgets.

Clockwise from top: Arts researcher Zannie Voss discusses findings about high-performing arts organizations of color with art leaders Juan Días, of *Sones des México Ensemble*; Blake-Anthony Johnson, of *Chicago Sinfonietta*; and Anh-Thu Pham of *Theater Mu*.



All this meant that planning for the effort entailed adopting practices that were unusual for Wallace, such as conducting an open call to solicit proposals from potential grantees and holding virtual “office hours/open houses” to answer questions from interested applicants individually—in part as a way to attract a wider, more diverse pool of potential candidates than we have had in the past.

By October, we had refashioned and expanded the initiative so that, among other things, it would include more arts organizations than we had originally envisioned; invest earlier and more heavily in smaller institutions; and support arts service organizations of color in their research endeavors. “With this initiative, we have taken an approach that seeks both to allow us to learn together with the grantees and to strengthen the sector of arts organizations of color,” said Bahia Ramos, director of arts at Wallace. “Ultimately, we hope the effort will build recognition and understanding of the distinctive contributions made by arts organizations of color—something that will contribute to creating a more equitable arts ecosystem and lift up the nonprofit arts field as a whole.”



Publications and other resources

Notable additions to our collection of arts resources in 2021 were two new episodes in our video conversation series, *Reimagining the Future of the Arts*, which we launched in 2020 as a response to the pandemic’s impact on the arts world. In one episode, leaders of arts organizations with deep roots in communities of color discuss what they see as the keys to their success, as well as what they have learned while contending with crises including COVID. The other examines how cultural organizations can adapt to be more responsive to diverse audiences’ needs. ■



This resource aims to help school district decision-makers understand the federal funding sources that can be tapped to develop sound principal pipelines.

ration study found that such pipelines led to academic benefits for students and were both feasible and affordable for school districts to build.

In the new initiative, each of eight school districts is exploring how to build a comprehensive, aligned pipeline that can produce school leaders capable of advancing the district’s vision of equity. To that end, the districts are working with community organizations, university principal preparation programs and state education agencies. The districts are Baltimore City; Columbus City, Ohio; the District of Columbia; Fresno; Jefferson County (Louisville), Ky.; Portland, Ore.; San Antonio; and Winston-Salem/Forsyth County Schools, N.C.

SCHOOL LEADERSHIP

The biggest development for Wallace’s education efforts in 2021 was the launch of a \$102 million initiative focused on developing school principals who are dedicated to and skillful at promoting equity in education.

The Equity-Centered Pipeline Initiative builds on the work of a number of earlier Wallace ventures, especially the Principal Pipeline Initiative. In that endeavor, six school districts developed what Wallace came to call “comprehensive, aligned principal pipelines”—meaning an approach to developing effective school leadership that comprises and interlocks seven key features, from rigorous standards for the principalship to strong on-the-job support and evaluation. A RAND Corpo-

A new initiative is working to develop school principals dedicated to and skillful at promoting equity in education.

COVID meant extending other Wallace efforts. Most notably, the ESSA Leadership Learning Community, which had worked since 2016 to assist teams from 11 states in developing and implementing plans for use of federal dollars to support effective school leadership efforts, saw its term extended from 2021 to 2022. The pandemic made itself felt, too, in how some of the teams used modest grants that Wallace made available to them in the effort’s final year. The Ohio team, for example, developed a toolkit to help parents better engage with schools, which could prove useful as families continue to cope with the challenges that the health crisis poses to their children’s education.

Publications and other resources

The year 2021 also saw the publication of the first two of a trio of Wallace-commissioned “knowledge syntheses” in which scholars reviewed and digested the evidence in key areas in school leadership. *How Principals Affect Students and Schools: A Systematic Synthesis of Two Decades of Research* examines principals’ impact on education and the characteristics of effective school leaders; *The Role of Assistant Principals: Evidence and Insights for Advancing School Leadership* explores topics including how the assistant principal role could be enlisted to foster educational equity, school improvement and principal effectiveness. The third synthesis, on school leader preparation and professional development, was set for release in 2022. Partly in response to the availability of COVID-related federal financial support for education, we also published *Strong Pipelines, Strong Principals*, a guide to help school district decision-makers understand the federal funding sources that can be tapped to develop sound principal pipelines. ■



Boston-area children were among those who took part in Wallace's National Summer Learning Project, which is still generating insights for the field. See publications on p. 13.

LEARNING AND ENRICHMENT

Launched in 2017, our Partnerships for Social and Emotional Learning Initiative has been exploring whether and how urban schools and out-of-school-time programs can effectively collaborate to support the social and emotional development of elementary school students. Grantee partners in six communities—Boston, Dallas, Denver, Palm Beach County (Fla.), Tacoma and Tulsa—have learned a great deal thus far about establishing partnerships between schools and out-of-school-time programs, building adults' capacity to support students' social and emotional learning (SEL), integrating SEL into academic instruction and out-of-school-time activities, and creating a positive culture and climate in school as well as in afterschool, summer and/or other out-of-school-time programs.

With other philanthropies, Wallace established a fund to help the out-of-school-time sector as it confronted the health crisis.

The initiative communities had to contend with major disruptions caused by COVID-19, and all six pivoted to respond to school closings and re-openings, provide emergency childcare, distribute meals and laptops, and develop new virtual models for school instruction and out-of-school-time programming. Not surprisingly, tending to these and other needs affected implementation of the initiative, delaying some planned activities and accelerating others. Among those on a faster track in 2021 were the adaptation and spread of social and emotional learning practices from the pilot sites that were the focus of the initiative's early years to the broader community—meant as a partial remedy to the pandemic's harmful impact on children's social-emotional well-being.

Building Community from Crisis: A Collaborative Fund for the Out-of-School Time Field

by Minna Jung



A pooled fund from a group of foundations aimed to help out-of-school-time efforts in pandemic recovery, while a tool from Every Hour Counts provided out-of-school-time systems with a way to gauge their work.

Pandemic-created needs were the spur to another effort in Learning and Enrichment as well. In 2020, the foundation joined with six other philanthropies to pool money for a \$1.5 million fund to assist the out-of-school-time field as it confronted the health crisis. Run under the umbrella of Grantmakers for Education’s Out-of-School Time Impact Group, the Afterschool and Summer Recovery and Opportunity Fund sought to assist national out-of-school-time organizations as they aided program providers in pandemic recovery and school reopening. Funding also went to organizations connected to historically excluded communities, in part to increase their communities’ representation in out-of-school-time policymaking and research. The pooled fund supported a range of projects that came to fruition in 2021, including a guide to equitable hiring and staff development for leaders of out-of-school-time efforts (from the National AfterSchool Association); a conference on re-imagining the future of afterschool programming (from Every Hour Counts, a network of out-of-school-time intermediary organizations); and a film series documenting young people’s experiences with remote learning (from the National Urban League). The other funders were the Bezos Family Foundation, S.D. Bechtel, Jr. Foundation, Charles Stewart Mott Foundation, New York Life Foundation, Overdeck Family Foundation, and Susan Crown Exchange.

Finally, Wallace began early information gathering and thinking about possibilities for a new initiative in learning and enrichment, for possible launch in 2023.

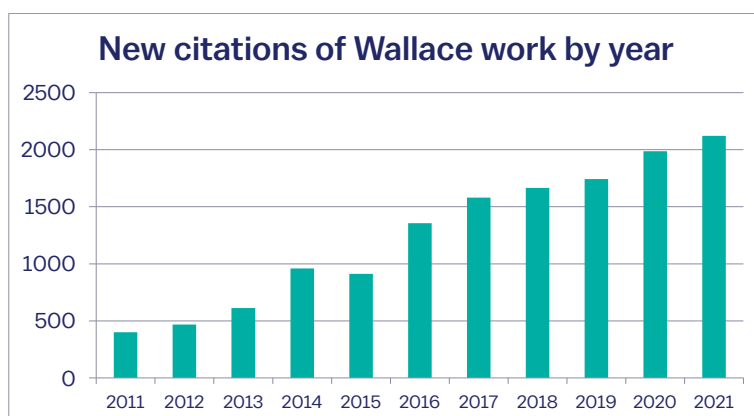
Publications and other resources

We released a number of publications and other resources in learning and enrichment in 2021. *Navigating Social and Emotional Learning from the Inside Out*, a guide to evidence-based social-emotional programs that has been something of a blockbuster by Wallace standards, having garnered more than 200,000 downloads since it was released in 2017, was re-issued in an updated and expanded version. It offers detailed information on 33 pre-K and elementary school programs, describing curriculum content and program highlights.

We also published Every Hour Counts’ *Putting Data to Work for Young People*, a tool and guidebook to help assess afterschool systems, the programs within them and youth outcomes—in the interest of informing system improvements. And a five-part Wallace podcast explores lessons learned from the Partnerships for Social and Emotional Learning Initiative, with episodes covering themes that surfaced in a RAND study of the effort’s implementation. Topics include the importance of social-emotional learning and the development of adult capacity to promote social and emotional learning. ■

Dissemination of information and ideas

At the core of Wallace’s work are the efforts by the foundation and its partners to generate knowledge to foster advancements in our areas of interest. That’s the reason we try to measure the reach of our reports and other resources, especially to policymakers, field professionals and other who can effect change.



One measure is citation of our work in the research literature, an indication of our contribution to field discourse and the importance attached to it. In 2021, new citations of Wallace-published materials increased by 2,122, to almost 17,000 total. This was the biggest annual jump since we began tracking citations through Google Scholar more than a decade ago.

Moving Forward

In the context of the many challenges of 2021, we sense there’s a heightened interest in the lessons and evidence we have accumulated over several decades—on issues ranging from the need for effective summer learning programming to the crucial role of principals and the value of scenario planning for arts organizations. We have seen increased attendance at webinars as well as at meetings of our “professional learning communities,” where participants in our initiatives gather with another and, in many cases, experts in their fields to share ideas and information. Thanks to the virtual meeting technologies that have proved invaluable during the health crisis, the school leadership unit, for example, was able to conduct 28 such gatherings in 2021. We are finding that we can draw on our knowledge bank to offer assistance in dealing with the uncertainties of the day.

None of this means we are standing still. We have made a new effort to incorporate into our work efforts in which grantees and researchers jointly develop research questions to be addressed and methods to study them. We also learned much from taking what were, for Wallace, novel approaches to shaping and carrying out initiatives, such as issuing the open call for proposals in the new arts effort. The lessons will likely influence how Wallace designs and implements its endeavors across our areas of interest in the future. Finally, to broaden the range of knowledge products that would be of interest to our readers, we introduced a new series title in the portion of our website where we house our library of reports and other resources. The Considerations title denotes publications that draw mainly on theory or expert knowledge, as opposed to publications based largely on empirical data or syntheses.

One thing stays constant, however: Wallace’s commitment to developing and disseminating credible ideas and information that can help the areas in which we work advance equity and improve. At a time when conversation in the nation has become ever more polarized and heated, that task has become more difficult—and more important than ever. ■

NEW PUBLICATIONS AND MULTIMEDIA RESOURCES FROM WALLACE

Downloadable for free at www.wallacefoundation.org

AFTERSCHOOL AND OUT-OF-SCHOOL-TIME PROGRAMMING

PUBLICATIONS

[Evidence-based Considerations for COVID-19 Reopening and Recovery Planning: Afterschool Coordination Systems to Support Afterschool Programming](#)

Coordinated afterschool systems backed by support of municipal leadership can help young people recover from the damaging impact of the pandemic.

[Putting Data to Work for Young People: A Framework for Measurement, Continuous Improvement, and Equitable Systems](#)

This tool and guidebook can help people assess afterschool (out-of-school-time) systems, the programs within them and youth outcomes—in the interest of informing system improvements.

BUILDING AUDIENCES FOR THE ARTS

[The Alchemy of High-Performing Arts Organizations, Part II: A Spotlight on Organizations of Color](#)

In the second part of a [study](#) examining how high-performing arts organizations achieve financial health, 21 leaders of arts organizations of color report that deep community engagement and high-quality programs were critical to their efforts.

[Building Arts Participation Through Transactions, Relationships, or Both](#)

The first chapter of a book based on interviews with professionals and audience members from 85 cultural organizations investigates the interdependence of an organization's transactional activities and community relationships.

[Millennials Are Not a Monolith: Experiences from One Group of Performing Arts Organizations' Audience-Building Efforts](#)

Strategies to engage millennials in the arts may benefit from accounting for the group's differences as well as its similarities, according to this brief.

[Why Is It Important That We Continue? Some Nonprofit Arts Organizations Rethink Their Value in Challenging Times](#)

Sustainability for nonprofit arts organizations should not be an end itself but rather a means for pursuing mission-related goals, this brief says.

SLIDE PRESENTATIONS

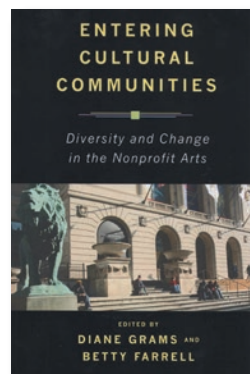
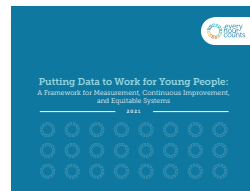
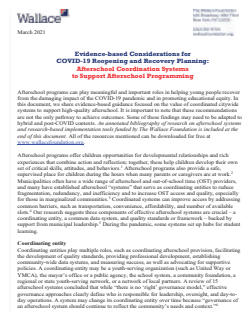
[What They Say and What They Do](#)

How can arts organizations use survey data to cultivate new audiences and strengthen bonds with current attendees?

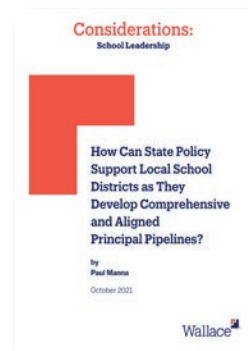
VIDEOS

[Reimagining the Future of the Arts: A Conversation Series](#)

In the wake of the pandemic and movement for racial justice, arts researchers and professionals met online beginning in 2020 for recorded discussions in which they shared insights to help inform the response of arts organizations to the months (and years) ahead. In 2021, the episodes were:



- [Video Replay: What Can the Arts Sector Learn From Arts Organizations of Color About Community Engagement and Financial Health?](#)
Leaders of arts organizations with deep roots in communities of color discuss what they see as the keys to their success, as well as what they have learned while navigating crises including COVID-19.
- [Video Replay: How Can Arts Organizations Respond to What Communities Need Most?](#)
What are ways in which cultural organizations can adapt to be more responsive to diverse audiences' needs?



SCHOOL LEADERSHIP

PUBLICATIONS

[Comments From The Wallace Foundation to the Department of Education on Defining the Term “educators” in Proposed Priorities and Definitions](#)

In a comment letter to the U.S. Department of Education about proposed guidance to school districts on the use of federal American Rescue Plan funds, the foundation discusses defining “educators” as “teachers, principals and other school leaders.”

[Evidence-based Considerations for COVID-19 Reopening and Recovery Planning: The Role of Principal Leadership in School Recovery and Reopening](#)

Effective principals are an essential part of school reopening and learning acceleration.

[How Can State Policy Support Local School Districts as They Develop Principal Pipelines?](#)

States can pull a number of policy levers to help school districts develop, support and maintain a large corps of effective school principals, political scientist Paul Manna writes.

[How Principals Affect Students and Schools: A Systematic Synthesis of Two Decades of Research](#)

An effective principal’s impact is stronger and broader than previously thought, making it “difficult to envision” a higher return on investment in K-12 education than the cultivation of high-quality school leadership, according to this research synthesis.

[Principal Leadership in a Virtual Environment](#)

Education technology experts provide early considerations for how to develop a pipeline of effective, equity-minded principals who have mastered operating in a virtual realm.

[Principal Pipeline Self-Study Guide for Districts](#)

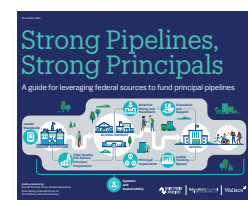
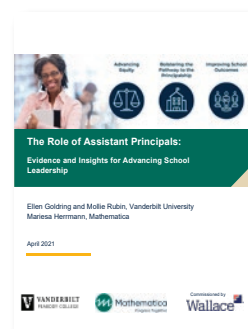
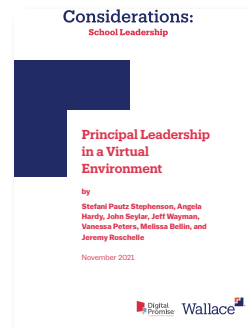
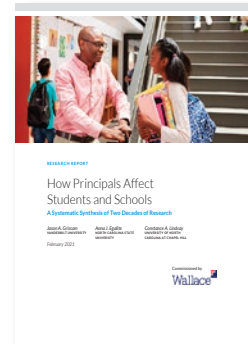
This guide by Policy Studies Associates is designed to help school districts take stock of and improve their school leadership policies, processes and structures.

[The Role of Assistant Principals: Evidence and Insights for Advancing School Leadership](#)

The number of assistant principals has grown markedly in recent years, and with reconsideration, the AP role could do more to help foster educational equity, school improvement and principal effectiveness, this research synthesis finds.

[Strong Pipelines, Strong Principals: A Guide for Leveraging Federal Sources to Fund Principal Pipelines](#)

This guide can help school district decision-makers understand the federal funding sources that can be tapped to develop strong principal pipelines.



SOCIAL AND EMOTIONAL LEARNING (SEL)

PUBLICATIONS

[Evidence-based Considerations for COVID-19 Reopening and Recovery Planning: The Importance of Adult Skills in Social and Emotional Learning \(SEL\)](#)

Using opportunities for social and emotional learning can be an important strategy in helping students recover from the effects of the pandemic and in promoting educational equity.

[Navigating Social and Emotional Learning from the Inside Out: Looking Inside and Across 33 Leading SEL Programs: A Practical Resource for Schools and OST Providers](#)

This updated and expanded guide to evidence-based SEL programs, by a team from Harvard's Graduate School of Education, offers detailed information on 33 pre-K through elementary school programs, encompassing curriculum content and program highlights.

PODCASTS

[The Partnerships for Social and Emotional Learning Podcast](#)

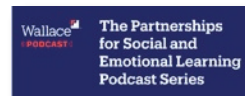
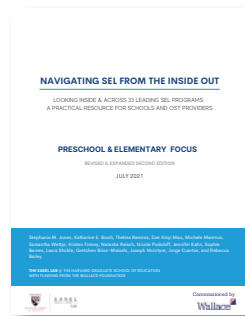
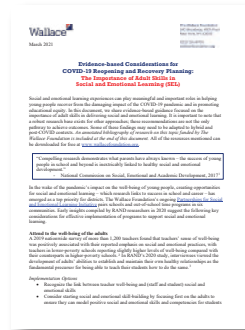
In this five-part series, professionals in schools and out-of-school-time programs share their experiences working together to help children develop social and emotional skills.

- [Episode 1](#) examines the importance of social and emotional learning and the design of Wallace's Partnership for Social and Emotional Learning Initiative, in which schools and out-of-school-time programs work together to build a consistent approach to SEL.
- [Episode 2](#) looks at why building adults' skills is a starting place for promoting SEL in children.
- [Episode 3](#) explores what it takes for schools and districts, as well as after-school programs and out-of-school-time intermediary organizations, to work together.
- [Episode 4](#) covers how to help schools and out-of-school-time programs adopt SEL instruction.
- [Episode 5](#) describes steps to integrating SEL across settings and what to look for.

SLIDE PRESENTATIONS

[Out-of-School Time Programs: Paving the Way for Children to Find Passion, Purpose & Voice](#)

New research, including national surveys of parents, teachers and program providers, sheds light on how these groups perceive the value of out-of-school-time programs in children's social, emotional and academic development, especially in the wake of the pandemic.



SUMMER LEARNING

PUBLICATIONS

[Comments from The Wallace Foundation to the Department of Education on Summer Learning and SEL in Proposed Priorities and Definitions](#)

In a comment letter to the U.S. Department of Education about proposed guidance to school districts on the use of federal American Rescue Plan funds, Wallace discusses clarifying that the term “out-of-school-time settings” refers to programs that occur in the summer, before and after school, in the evenings and on weekends.

[America After 3PM: Time for a Game-Changing Summer. With Opportunity and Growth for All of America’s Youth](#)

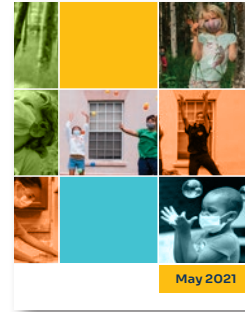
This publication uses data collected before and during the pandemic to assess children’s participation in summer programs, including who has access to them and who is missing out.

[Evidence-based Considerations for COVID-19 Reopening and Recovery Planning: Summer Learning with Academic and Non-Academic Activities](#)

Summer can be a crucial time to address the pandemic’s impact on young people. Evidence from Wallace’s National Summer Learning Project indicates such programs should be targeted to the needs of participants, have programming linked to desired outcomes, be of sufficient duration and promote strong attendance.

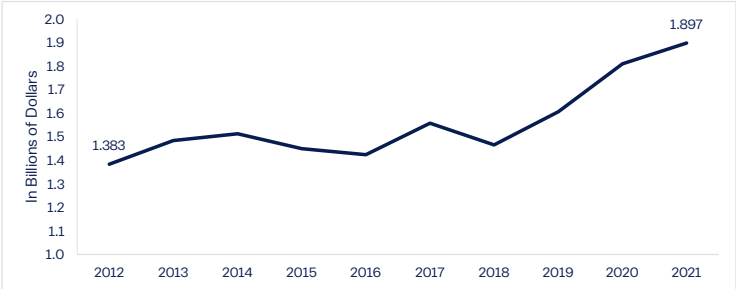
[Summer for All: Building Coordinated Networks to Promote Access to Quality Summer Learning and Enrichment Opportunities Across a Community](#)

The RAND Corp. looks at how organizations in four cities successfully coordinated efforts to increase access to, and improve the quality of, summer learning opportunities.



FINANCIAL OVERVIEW

INVESTMENT ASSETS

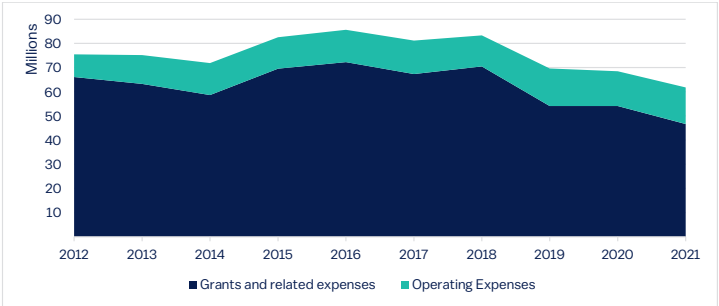


Our portfolio totaled \$1.897 billion on December 31, 2021, which was \$88 million higher than our assets

Our portfolio totaled \$1.897 billion on December 31, 2021, which was \$88 million higher than our assets of \$1.809 billion on December 31, 2020. The increase reflects the net market appreciation of our portfolio after deducting grants and expenses of \$66.7 million paid in 2021.

Our portfolio value on December 31, 2021 was \$514 million higher than our assets of \$1.383 billion on December 31, 2012, on a nominal basis. We paid a total of \$743.7 million in grants and expenses over that 10-year period.

WALLACE'S EXPENSES OVER A DECADE

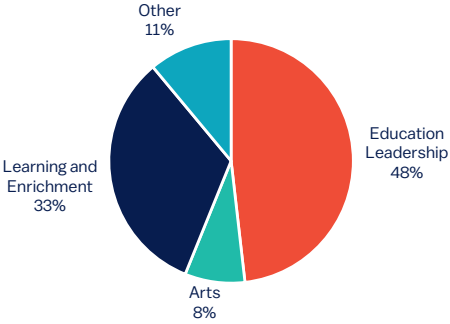


The bulk of expenditures under “grants and related expenses” goes to education, arts, social service and similar nonprofit organizations. Also included is spending for research and communications. This chart reflects expenses on an accrual basis, meaning expenses are reported in the year they are incurred,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

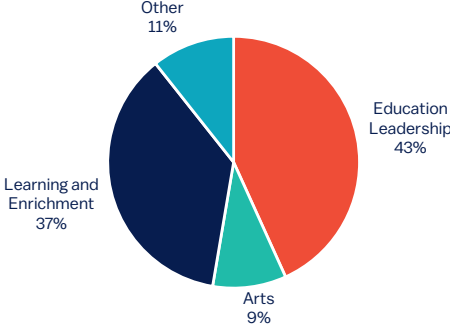
GRANT/PROGRAM EXPENSES BY FOCUS AREA

The pie charts below show spending, by percentage, in Wallace’s areas of interest. The first shows program grants and expenses approved in 2021; the second shows grants/expenses paid in 2021 (including grants approved in earlier years); the third shows the total grant amounts approved since 2012.

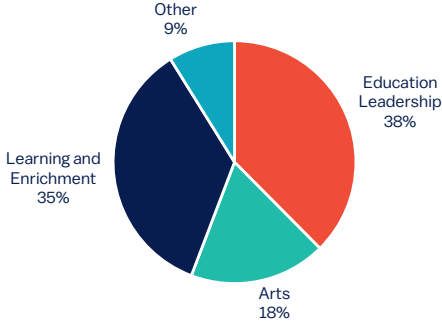
Approved in 2021



Paid in 2021



Approved from 2012 to 2021 (\$706 million)



PROGRAM EXPENDITURES AND COMMITMENTS

The following tables describe and list the expenditures made in 2021 to advance Wallace’s work in its focus areas of school leadership, learning and enrichment, and the arts. For a number of the efforts in 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 innovations, by which we mean 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 areas of interest. We then use a number of different communications strategies to get the word out.

SCHOOL LEADERSHIP

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.

COMPREHENSIVE, ALIGNED PRINCIPAL PIPELINES

In 2019, a major study by the RAND Corporation found that principal pipelines, as developed by six school districts in Wallace’s Principal Pipeline Initiative, provided benefits for student achievement and principal retention. Wallace describes these pipelines as “comprehensive and aligned”— “comprehensive” because their seven key parts cover a range of school district leadership development activities, from creating rigorous standards for the principalship to providing principals with strong on-the-job support, and “aligned” because the parts reinforce each another. Since 2019, Wallace has worked to promote comprehensive, aligned pipelines in a number of ways. One is the Principal Pipeline Learning Community, in which 90 school districts from 31 states have set out to assess their principal development efforts, compare them to the features of the pipeline approach, and, based on the findings, make plans to strengthen their work.

Organization / IRS name, if different (City, State)	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
ANTHONY EDUCATION FOUNDATION, LLC (Bowie, Md.)— For activities including training individuals and organizations helping districts to develop principal pipelines.	\$29,724	\$0	\$25,524	\$4,200	\$0
COUNCIL OF THE GREAT CITY SCHOOLS (Washington, D.C.)—To provide consultation to Principal Pipeline Learning Community districts on use of American Rescue Plan funds to achieve their strategic objectives.	\$400,000	\$400,000	\$0	\$153,132	\$246,868
COUNCIL OF THE GREAT CITY SCHOOLS (Washington, D.C.)—To develop a tool to aid school districts in planning for use of American Rescue Plan funding.	\$100,000	\$100,000	\$0	\$50,000	\$50,000

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
DIGITAL PROMISE GLOBAL (Washington, D.C.)—To produce a report providing early considerations for how to develop a pipeline of effective, equity-minded principals who can operate well in a virtual environment.	\$199,260	\$0	\$0	\$32,727	\$166,534
THE INSTITUTE FOR EXCELLENCE IN EDUCATION (Mount Pleasant, Mo.)—To encourage the development of effective principal pipelines in organizations that manage large numbers of charter schools.	\$250,000	\$0	\$0	\$207,955	\$42,045
THE LEADERSHIP ACADEMY, INC. (New York City)—To help Principal Pipeline Learning Community districts use American Rescue Plan funds to achieve their strategic objectives.	\$430,000	\$430,000	\$0	\$308,480	\$121,520
THE LEADERSHIP ACADEMY, INC. (New York City)—To assist districts involved in the principal pipeline spread work.	\$500,000	\$500,000	\$0	\$500,000	\$0
NATIONAL ASSOCIATION OF SECONDARY SCHOOL PRINCIPALS (Reston, Va.)—To provide consultation to Principal Pipeline Learning Community districts on American Rescue Plan funding.	\$420,000	\$420,000	\$0	\$360,000	\$60,000
NELSON MULLINS RILEY & SCARBOROUGH LLP DBA EDUCATIONCOUNSEL LLC (Washington, D.C.)—To help develop a guide to aid school districts in understanding use of American Rescue Plan funds to develop principal pipelines.	\$40,000	\$40,000	\$0	\$20,000	\$20,000
POLICY STUDIES ASSOCIATES, INC. (Washington, D.C.)—To help develop a guide to aid school districts in understanding use of American Rescue Plan funds to develop principal pipelines.	\$115,000	\$115,000	\$0	\$57,500	\$57,500
RAND CORPORATION (Santa Monica, Calif.)—To help disseminate findings from the Principal Pipeline Initiative.	\$34,362	\$0	\$22,914	\$0	\$11,448
THE TREMENDOUSNESS COLLECTIVE (Saint Louis)—To design, illustrate and produce the Principal Pipeline funding guide booklet.	\$30,000	\$30,000	\$0	\$0	\$30,000
VANDERBILT UNIVERSITY (Nashville)—To study the work of districts in the Principal Pipeline Learning Community.	\$699,677	\$0	\$0	\$242,096	\$457,581
OTHER RELATED EXPENSES —Activities including research grants to study state policies related to school leadership.	\$13,750	\$0	\$12,500	\$1,250	\$0
	\$3,261,773	\$2,035,000	\$60,937	\$1,937,339	\$1,263,496

EQUITY-CENTERED PIPELINE INITIATIVE

Building on strong evidence that comprehensive, aligned principal pipelines can be a feasible, affordable and effective way to improve student achievement districtwide, eight large school districts are exploring how to develop pipelines that can produce school leaders capable of advancing each district's own vision of equity.

1. DEVELOP INNOVATION SITES

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
BOARD OF EDUCATION OF JEFFERSON COUNTY, KENTUCKY (Louisville, Ky.)—To participate in the Equity-Centered Pipeline Initiative.	\$1,890,000	\$1,890,000	\$0	\$1,890,000	\$0
COLUMBUS CITY SCHOOLS (Columbus, Ohio)—To participate in the Equity-Centered Pipeline Initiative.	\$1,890,000	\$1,890,000	\$0	\$1,890,000	\$0
COUNCIL OF THE GREAT CITY SCHOOLS (Washington, D.C.)—To support school boards of the districts participating in the Equity-Centered Pipeline Initiative.	\$240,000	\$240,000	\$0	\$240,000	\$0
DC PUBLIC EDUCATION FUND (Washington, D.C.)—To participate in the Equity-Centered Pipeline Initiative.	\$1,890,000	\$1,890,000	\$0	\$1,890,000	\$0
EDUCATION DEVELOPMENT CENTER, INC. (Waltham, Mass.)—To assist districts that participated in a project that helped prepare for the initiative.	\$620,305	\$0	\$813,551	\$0	\$0
FRESNO UNIFIED SCHOOL DISTRICT (Fresno, Calif.)—To participate in the Equity-Centered Pipeline Initiative.	\$1,890,000	\$1,890,000	\$0	\$1,890,000	\$0
FUND FOR EDUCATIONAL EXCELLENCE, INC. (Baltimore)—To support the participation of Baltimore City Public Schools in the Equity-Centered Pipeline Initiative.	\$1,890,000	\$1,890,000	\$0	\$1,890,000	\$0
THE LEADERSHIP ACADEMY, INC. (New York City)—To help districts applying for the Equity-Centered Pipeline Initiative develop their proposals and to help participating districts conduct an equity review.	\$709,428	\$433,000	\$0	\$709,428	\$0
LEARNING FORWARD (Richardson, Tex.)—To manage the initiative learning community.	\$946,080	\$0	\$0	\$189,216	\$756,864
NATIONAL POLICY BOARD FOR EDUCATIONAL ADMINISTRATION (Reston, Va.)—For activities including providing feedback to initiative districts as they developed equity standards.	\$100,000	\$100,000	\$0	\$100,000	\$0
NATIONAL URBAN LEAGUE, INC. (New York City)—To support districts participating in the Equity-Centered Pipeline Initiative.	\$300,000	\$300,000	\$0	\$300,000	\$0
ORRICK HERRINGTON & SUTCLIFFE LLP (San Francisco)—To understand legal considerations of the initiative.	\$25,000	\$0	\$0	\$11,693	\$13,307
POLICY STUDIES ASSOCIATES, INC. (Washington, D.C.)—To review and synthesize the work of districts exploring efforts to ensure equity in their schools so that work can inform future Wallace initiatives.	\$150,000	\$0	\$114,605	\$35,395	\$0
PORTLAND PUBLIC SCHOOLS (Portland, Ore.)—To participate in the Equity-Centered Pipeline Initiative.	\$1,990,000	\$1,890,000	\$0	\$1,990,000	\$0
SAN ANTONIO INDEPENDENT SCHOOL DISTRICT (San Antonio)—To participate in the Equity-Centered Pipeline Initiative.	\$1,890,000	\$1,890,000	\$0	\$1,890,000	\$0

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
WINSTON SALEM FORSYTH COUNTY SCHOOLS (Winston Salem, N.C.)—To participate in the Equity-Centered Pipeline Initiative.	\$1,890,000	\$1,890,000	\$0	\$1,890,000	\$0
OTHER RELATED EXPENSES —Consulting services to help participating districts plan and implement their work.	\$805,250	\$150,000	\$0	\$99,745	\$705,505
OTHER RELATED EXPENSES —Activities including helping Wallace in grantee selection.	\$138,900	\$0	\$0	\$138,900	\$0

2. DEVELOP AND SHARE KNOWLEDGE

BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM (Madison, Wis.)—To support a study of leadership practices of districts participating in the Equity-Centered Principal Pipeline Initiative.	\$8,093,979	\$0	\$0	\$0	\$8,093,979
THE REGENTS OF THE UNIVERSITY OF COLORADO (Denver)—To support a team studying and coordinating the use of research among districts participating in the Equity-Centered Principal Pipeline Initiative.	\$2,379,834	\$0	\$0	\$91,789	\$2,288,045
TEACHERS COLLEGE, COLUMBIA UNIVERSITY (New York City)—To produce a report that reviews available literature on equity-centered leadership.	\$137,178	\$0	\$96,025	\$20,577	\$20,577
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL (Chapel Hill, N.C.)—To explore new avenues of research that could help develop equity-centered principal pipelines.	\$144,329	\$0	\$47,362	\$96,967	\$0
UNIVERSITY OF WASHINGTON (Seattle)—To update a tool to help districts ensure effective and equitable school leadership.	\$217,638	\$217,638	\$0	\$217,638	\$0
	\$30,227,921	\$16,560,638	\$1,071,543	\$17,471,347	\$11,878,276

EVERY STUDENT SUCCEEDS ACT (ESSA) LEADERSHIP LEARNING COMMUNITY

This effort, scheduled to end in 2022, has sought to help teams from 11 states and districts within them use school leadership to pursue equity and school improvement, with support from the federal Every Student Succeeds Act..

1. DEVELOP INNOVATION SITES

THE LEADERSHIP ACADEMY, INC. (New York City)—To manage the work of the ESSA Leadership Learning Community.	\$3,050,000	\$1,650,000	\$480,561	\$1,029,006	\$1,540,433
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2. DEVELOP AND SHARE KNOWLEDGE

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
EDUCATION COMMISSION OF THE STATES (Denver)—To provide research and other services to learning community participants.	\$150,000	\$150,000	\$0	\$150,000	\$0
POLICY STUDIES ASSOCIATES, INC. (Washington, D.C.)—To study and document the work of the states participating in the ESSA Leadership Learning Community.	\$900,000	\$0	\$424,476	\$301,828	\$173,696
OTHER RELATED EXPENSES —Research and editorial services.	\$150,000	\$0	\$15,000	\$0	\$135,000
	\$4,250,000	\$1,800,000	\$920,037	\$1,480,834	\$1,849,129

UNIVERSITY PRINCIPAL PREPARATION INITIATIVE

This initiative, which formally concluded in 2021, sought to help universities improve their programs to train future principals.

AMERICAN INSTITUTES FOR RESEARCH IN THE BEHAVIORAL SCIENCES (Washington, D.C.)—To organize professional learning communities for the initiative, including one targeted at state participants in the effort.	\$396,242	\$0	\$670,000	\$0	\$0
RAND CORPORATION (Santa Monica, Calif.)—To conduct an evaluation of the University Principal Preparation Initiative.	\$3,799,072	\$0	\$3,129,072	\$525,000	\$145,000
THE UNIVERSITY COUNCIL FOR EDUCATIONAL ADMINISTRATION INC. (East Lansing, Mich.)—To serve as a Wallace communications partner.	\$125,000	\$125,000	\$0	\$0	\$125,000
WESTED (San Francisco)—To conduct two professional learning community sessions in collaboration with the University Council for Educational Administration.	\$250,000	\$250,000	\$0	\$250,000	\$0
	\$4,570,314	\$375,000	\$3,799,072	\$775,000	\$270,000

OTHER SCHOOL LEADERSHIP PROJECTS

AMERICAN ASSOCIATION OF SCHOOL ADMINISTRATORS, INC. (Alexandria, Va.)—To serve as a Wallace communications partner.	\$350,000	\$0	\$175,000	\$175,000	\$0
ARABELLA ADVISORS, LLC (Washington, D.C.)—To support a network of education leadership funders.	\$79,911	\$0	\$62,649	\$17,263	\$0
ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT (Alexandria, Va.)—To serve as a Wallace communications partner.	\$50,000	\$0	\$25,000	\$0	\$25,000

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
COUNCIL OF CHIEF STATE SCHOOL OFFICERS (Washington, D.C.)—To serve as a Wallace communications partner.	\$400,000	\$0	\$200,000	\$200,000	\$0
EDUCATION DEVELOPMENT CENTER, INC. (Waltham, Mass.)—To help the Texas Education Agency use a tool to assess principal preparation and to update the tool to include a focus on equity.	\$787,655	\$412,325	\$375,330	\$412,325	\$0
LEARNING POLICY INSTITUTE (Palo Alto, Calif.)—To produce a report synthesizing research about principal preparation and development.	\$731,799	\$0	\$696,174	\$30,451	\$5,174
NATIONAL ASSOCIATION OF ELEMENTARY SCHOOL PRINCIPALS FOUNDATION (Alexandria, Va.)—To serve as a Wallace communications partner.	\$200,000	\$0	\$100,000	\$0	\$100,000
NATIONAL ASSOCIATION OF STATE BOARDS OF EDUCATION (Alexandria, Va.)—To serve as a Wallace communications partner.	\$300,000	\$0	\$150,000	\$150,000	\$0
NELSON MULLINS RILEY & SCARBOROUGH LLP DBA EDUCATIONCOUNSEL LLC (Washington, D.C.)—To support Wallace’s school leadership initiatives and learning communities.	\$790,000	\$0	\$693,523	\$87,500	\$8,977
POLICY STUDIES ASSOCIATES, INC. (Washington, D.C.)—To support a network of school leadership funders.	\$125,000	\$125,000	\$0	\$98,925	\$26,075
RAND CORPORATION (Santa Monica, Calif.)—To support a national survey of school principals.	\$175,000	\$175,000	\$0	\$0	\$175,000
VANDERBILT UNIVERSITY (Nashville)—To produce a report synthesizing research about assistant principals.	\$739,374	\$0	\$686,321	\$53,054	\$0
VANDERBILT UNIVERSITY (Nashville)—To produce a report synthesizing research about principals and their impact.	\$524,169	\$0	\$423,744	\$100,425	\$0
OTHER RELATED EXPENSES —Grant management services and support.	\$249,463	\$0	\$196,133	\$46,580	\$6,750
	\$5,502,372	\$712,325	\$3,783,874	\$1,371,522	\$346,976

LEARNING AND ENRICHMENT

AFTERSCHOOL

This work builds on efforts Wallace supported for almost 15 years, ending around 2017, to develop and test a coordinated citywide approach to increasing participation in high-quality afterschool programs—an approach that is also part of Wallace’s Partnerships for Social and Emotional Learning Initiative.

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
AFTERSCHOOL ALLIANCE (Washington, D.C.)—To support the organization’s communications to state and local officials about the use of American Rescue Plan and other federal funding for afterschool systems and programs.	\$250,000	\$250,000	\$0	\$250,000	\$0
AFTERSCHOOL ALLIANCE (Washington, D.C.)—To serve as a Wallace communications partner.	\$250,000	\$0	\$125,000	\$125,000	\$0
BDO-FMA (New York City)—To update and redesign the strongnonprofits.org website.	\$190,000	\$100,000	\$75,000	\$52,000	\$63,000
BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM (Madison, Wis.)—To explore how out-of-school-time learning programs could engage young people from historically marginalized communities.	\$160,810	\$0	\$0	\$128,860	\$31,950
CHILD TRENDS INCORPORATED (Bethesda, Md.)—To identify current approaches to documenting and measuring impacts of out-of-school-time programs.	\$200,000	\$0	\$0	\$171,772	\$28,228
EXPANDED SCHOOLS INC. (NEW YORK CITY) —To support Every Hour Counts’ work as a Wallace communications partner.	\$205,000	\$205,000	\$0	\$205,000	\$0
EXPANDED SCHOOLS, INC. (New York City)—To promote understanding and adoption of a tool to assess and strengthen afterschool systems.	\$235,000	\$235,000	\$0	\$235,000	\$0
GRANTMAKERS FOR EDUCATION (Portland, Ore.)—To create a new network in which out-of-school-time programs can share experiences, lessons and trends from their work.	\$50,000	\$50,000	\$0	\$50,000	\$0
NATIONAL AFTERSCHOOL ASSOCIATION (Oakton, Va.)—To serve as a Wallace communications partner.	\$125,000	\$125,000	\$0	\$125,000	\$0
THE RECTOR AND VISITORS OF THE UNIVERSITY OF VIRGINIA (Charlottesville, Va.)—To fund a study examining equity in school district-run out-of-school-time programs.	\$155,946	\$0	\$0	\$127,812	\$28,134
RESEARCH FOR ACTION, INC. (Philadelphia)—To fund a study of how cities drew on their out-of-school-time efforts to support young people and communities during pandemic.	\$722,000	\$0	\$0	\$109,954	\$612,046
OTHER RELATED EXPENSES —Research services.	\$2,641	\$2,641	\$0	\$2,641	\$0
	\$2,546,397	\$967,641	\$200,000	\$1,583,039	\$763,357

SUMMER LEARNING

This work seeks to improve summer learning opportunities for children. It builds on lessons learned from Wallace’s National Summer Learning Project, in which school districts and community organizations collaborated to provide students with high-quality summer learning programming. The effort resulted in academic and other benefits for children with consistent attendance, according to research, and provided insights on key elements of effective programs..

1. DEVELOP INNOVATION SITES

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
COMMUNITIES FOUNDATION OF TEXAS, INC. (Dallas)—To support efforts to strengthen summer learning programs in Texas.	\$12,784,763	\$0	\$9,138,800	\$250,187	\$3,395,776
COUNCIL OF CHIEF STATE SCHOOL OFFICERS (Washington, D.C.)—To support state education agencies in designing summer programs that could help make up for disruptions to education caused by the COVID-19 pandemic.	\$720,000	\$720,000	\$0	\$357,243	\$362,757
FAMILY HEALTH INTERNATIONAL (Durham, N.C.)—To organize a learning community of school districts interested in developing plans to carry out strong summer learning efforts.	\$3,139,854	\$3,139,854	\$0	\$3,139,854	\$0
THE LEARNING AGENDA, INC. (Akron, Ohio)—To support the Texas Education Agency’s efforts to improve summer learning programs in that state.	\$529,075	\$0	\$170,040	\$359,035	\$0
NATIONAL SUMMER LEARNING ASSOCIATION, INC. (Washington, D.C.)—To help state education agencies design summer programs that could help make up for disruptions to education caused by the COVID-19 pandemic.	\$930,000	\$930,000	\$0	\$930,000	\$0
RAND CORPORATION (Santa Monica, Calif.)—To support efforts by the Texas Education Agency to incorporate evidence-based practices into new summer learning efforts.	\$29,000	\$0	\$26,793	\$2,207	\$0
TEXAS EDUCATION AGENCY (Austin)—To help Texas school districts adopt or adapt research-based practices that promote summer learning.	\$619,376	\$0	\$152,225	\$151,708	\$315,443

2. DEVELOP AND SHARE KNOWLEDGE

AMERICAN INSTITUTES FOR RESEARCH IN THE BEHAVIORAL SCIENCES (Washington, D.C.)—To support a study of how Texas school districts incorporate evidence-based strategies into the design and implementation of summer learning programs.	\$1,597,802	\$0	\$159,780	\$365,882	\$1,072,140
EDUCATION DEVELOPMENT CENTER, INC. (Waltham, Mass.)—To fund a study of the policies, practices and resources that go into planning, developing and operating district-run summer learning programs.	\$650,000	\$0	\$357,912	\$255,538	\$36,550
THE LEARNING AGENDA, INC. (Akron, Ohio)—To help disseminate the Summer Learning Toolkit.	\$372,095	\$222,095	\$131,517	\$38,129	\$202,449
NATIONAL SUMMER LEARNING ASSOCIATION, INC. (Washington, D.C.)—To serve as a Wallace communications partner.	\$275,000	\$275,000	\$0	\$275,000	\$0
RAND CORPORATION (Santa Monica, Calif.)—To study Wallace’s National Summer Learning Project and help publicize its results.	\$2,011,928	\$60,000	\$1,894,928	\$65,000	\$52,000

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
WESTAT, INC. (Rockville, Md.)—To fund a study documenting and analyzing how states and districts designed and implemented summer learning efforts in the wake of the pandemic.	\$1,321,364	\$1,321,364	\$0	\$91,472	\$1,229,892
OTHER RELATED EXPENSES —Strategic communications services.	\$10,700	\$0	\$7,650	\$3,050	\$0
	\$24,990,957	\$6,668,313	\$12,039,645	\$6,284,305	\$6,667,008

PARTNERSHIPS FOR SOCIAL AND EMOTIONAL LEARNING INITIATIVE

This initiative supports efforts to have schools and out-of-school-time programs in selected communities improve and align their work to help children develop social and emotional skills.

1. DEVELOP INNOVATION SITES

BIG THOUGHT (Dallas)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$1,289,225	\$50,000	\$1,013,225	\$251,000	\$25,000
BOSTON AFTER SCHOOL & BEYOND, INC. (Boston)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$2,463,250	\$850,000	\$0	\$1,613,250	\$850,000
BRANSOM WORKING GROUP (Coppell, Tex.)—To support data collection, analysis, reporting and communications among organizations participating in the Partnerships for Social and Emotional Learning Initiative.	\$340,000	\$0	\$135,958	\$101,175	\$39,600
CITY AND COUNTY OF DENVER - MANAGER OF FINANCE (Denver)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$1,724,800	\$150,000	\$1,274,800	\$300,000	\$150,000
COLLABORATIVE FOR ACADEMIC, SOCIAL, AND EMOTIONAL LEARNING (Chicago)—To assist cities participating in the Partnerships for Social and Emotional Learning Initiative.	\$340,000	\$340,000	\$0	\$340,000	\$0
CROSBY MARKETING COMMUNICATIONS, INC. (Annapolis, Md.)—To assist cities participating in the Partnerships for Social and Emotional Learning Initiative.	\$150,000	\$0	\$67,085	\$20,940	\$61,975
DALLAS INDEPENDENT SCHOOL DISTRICT (Dallas)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$1,265,775	\$100,000	\$866,525	\$349,250	\$50,000
EDUCATION FIRST CONSULTING LLC (Seattle)—For activities including organizing learning community meetings for the Partnerships for Social and Emotional Learning Initiative.	\$167,719	\$0	\$59,306	\$108,413	\$0
THE FORUM FOR YOUTH INVESTMENT (Washington, D.C.)—For activities including assisting cities participating in the Partnerships for Social and Emotional Learning Initiative.	\$440,000	\$440,000	\$0	\$440,000	\$0
THE GREATER TACOMA COMMUNITY FOUNDATION (Tacoma, Wash.)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$2,350,000	\$150,000	\$1,399,184	\$800,816	\$150,000
PRIME TIME PALM BEACH COUNTY INC. (Boynton Beach, Fla.)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$901,000	\$50,000	\$772,000	\$104,000	\$25,000

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2020	PAID 2021	FUTURE PAYMENTS
SCHOOL BOARD OF PALM BEACH COUNTY (West Palm Beach, Fla.)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$1,649,000	\$100,000	\$1,067,250	\$481,750	\$100,000
TULSA COMMUNITY FOUNDATION (Tulsa)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$1,105,755	\$75,000	\$892,188	\$176,067	\$37,500
TULSA PUBLIC SCHOOL DISTRICT NO. 1 (Tulsa)—To participate in the Partnerships for Social and Emotional Learning Initiative.	\$1,019,069	\$75,000	\$805,502	\$138,567	\$75,000
OTHER RELATED EXPENSES —Expenses related to the organization of learning communities.	\$17,546	\$17,546	\$0	\$17,546	\$0

2.DEVELOP AND SHARE KNOWLEDGE

THE HATCHER GROUP, INC. (Bethesda, Md.)—To support the development of a video and a podcast series about Partnerships for Social and Emotional Learning Initiative.	\$87,944	\$0	\$47,572	\$40,372	\$0
RAND CORPORATION (Santa Monica, Calif.)—To conduct an evaluation of the Partnerships for Social and Emotional Learning Initiative.	\$7,888,000	\$388,000	\$3,381,724	\$2,100,000	\$2,406,276
MATHEMATICA, INC. (Princeton, N.J.)—To coordinate the administration of an online assessment of students in communities participating in the Partnerships for Social and Emotional Learning Initiative.	\$1,292,013	\$0	\$740,218	\$226,185	\$325,609
XSEL LABS INCORPORATED (Evanston, Ill.)—To support the administration of an assessment of children’s social and emotional skills.	\$880,385	\$0	\$670,187	\$163,915	\$46,283
	\$25,371,481	\$2,785,546	\$13,192,724	\$7,773,246	\$4,342,243

OTHER LEARNING AND ENRICHMENT PROJECTS

AMERICAN INSTITUTES FOR RESEARCH IN THE BEHAVIORAL SCIENCES (Washington, D.C.)—To support a national study of the youth development workforce.	\$1,699,268	\$1,699,268	\$0	\$223,111	\$1,476,157
ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT (Alexandria, Va.)—To serve as a Wallace communications partner.	\$100,000	\$0	\$50,000	\$0	\$50,000
CHILDREN'S FUNDING PROJECT (Washington, D.C.)—To support the creation of regional hubs to help communities fund programs for youth development.	\$1,200,000	\$1,200,000	\$0	\$400,000	\$800,000
COLLABORATIVE FOR ACADEMIC, SOCIAL, AND EMOTIONAL LEARNING (Chicago)—To sponsor a virtual summit on social and emotional development.	\$10,000	\$10,000	\$0	\$10,000	\$0
THE FORUM FOR YOUTH INVESTMENT (Washington, D.C.)—For general operating support and to serve as a Wallace communications partner.	\$3,850,000	\$0	\$2,524,000	\$1,326,000	\$0
LEARNING POLICY INSTITUTE (Palo Alto, Calif.)—To support the Whole Child Policy Table, an initiative to coordinate research and policy activities “working to create school environments in which every student is supported to learn and thrive academically, socially, and emotionally.”	\$1,000,000	\$1,000,000	\$0	\$1,000,000	\$0

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
MEADOWS MENTAL HEALTH POLICY INSTITUTE FOR TEXAS (Dallas)—To support the Dallas Independent School District’s efforts to reimagine disciplinary practices in schools.	\$250,000	\$250,000	\$0	\$250,000	\$0
NELSON MULLINS RILEY & SCARBOROUGH LLP DBA EDUCATIONCOUNSEL LLC (Washington, D.C.)—To develop a tool that can help education agencies understand the use of federal COVID-relief funds to support summer, afterschool and social-emotional learning efforts.	\$75,000	\$75,000	\$0	\$0	\$75,000
PRESIDENT AND FELLOWS OF HARVARD COLLEGE (Cambridge, Mass.)—To expand a guide to social and emotional learning programs for elementary school students and to create a new guide to programs for middle and high school students.	\$1,010,329	\$0	\$570,455	\$419,255	\$20,619
RAND CORPORATION (Santa Monica, Calif.)—To survey public school teachers about activities related to social and emotional learning.	\$152,617	\$0	\$116,804	\$35,813	\$0
SOCIETY FOR RESEARCH IN CHILD DEVELOPMENT (Washington, D.C.)—To support sessions at a conference on creativity, play and learning, and to help the organization expand and deepen its equity efforts.	\$235,000	\$10,000	\$75,000	\$85,000	\$75,000
STEM NEXT OPPORTUNITY FUND (San Diego)—To help fund a fellowship at the U.S. Department of Education focusing on out-of-school-time programming.	\$250,000	\$250,000	\$0	\$125,000	\$125,000
OTHER RELATED EXPENSES —Consulting services to help school districts use resources made available in the federal Elementary and Secondary School Relief Fund.	\$15,270	\$15,270	\$0	\$15,270	\$0
	\$9,847,484	\$4,509,538	\$3,336,260	\$3,889,449	\$2,621,775

ARTS

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

BUILDING AUDIENCES FOR SUSTAINABILITY

In 2021, Wallace was wrapping up the Building Audiences for Sustainability Initiative, which sought to determine whether and how arts organizations' efforts to develop larger, more engaged audiences could lead to more stable finances. We also announced a new, five-year, \$100-million initiative to explore how arts organizations of color could work with their communities to ensure the organizations' well-being. The grants and contracts listed below were largely used to finish work in our earlier initiative and help determine the contours of the next one.

1. DEVELOP INNOVATION SITES

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
THE MARLO COMPANIES (Ashburn, Va.)—To help develop Wallace's new arts initiative by convening arts service organizations and synthesizing their views.	\$124,000	\$124,000	\$0	\$44,000	\$80,000
SUBMITTABLE HOLDINGS INC. (Missoula, Mont.)—To create an online interface for submitting applications to Wallace's new efforts in the arts.	\$31,300	\$31,300	\$0	\$31,300	\$0
TECHNICAL DEVELOPMENT CORPORATION (Boston)—To help manage the Building Audiences for Sustainability Initiative.	\$550,589	\$0	\$524,104	\$26,485	\$0
URBAN INSTITUTE (Washington, D.C.)—To help inform the development of a new arts initiative by creating and refining an algorithm that identifies arts organizations of color in the institute's National Center for Charitable Statistics database.	\$180,000	\$0	\$1,925	\$178,075	\$0
ZEBRA STRATEGIES, INC. (New York City)—To conduct market research about expanding equity in the arts.	\$75,000	\$75,000	\$0	\$75,000	\$0
OTHER RELATED EXPENSES —Consulting services to compare Wallace's arts grantees to those of other foundations and inform the development of a new arts initiative.	\$80,850	\$0	\$57,300	\$23,550	\$0

2. DEVELOP AND SHARE KNOWLEDGE

AEA CONSULTING LLC (Beacon, N.Y.)—To update a 2020 post-pandemic scenario-planning tool for arts organizations.	\$25,000	\$25,000	\$0	\$10,819	\$14,181
AMERICAN ASSOCIATION OF MUSEUMS (Arlington, Va.)—To serve as a Wallace communications partner.	\$100,000	\$100,000	\$0	\$100,000	\$0
AMERICAN SYMPHONY ORCHESTRA LEAGUE (New York City)—To serve as a Wallace communications partner.	\$100,000	\$100,000	\$0	\$100,000	\$0
ASSOCIATION OF ARTS ADMINISTRATION EDUCATORS INC. (Providence, R.I.)—To serve as a Wallace communications partner.	\$25,000	\$25,000	\$0	\$25,000	\$0
ASSOCIATION OF PERFORMING ARTS PROFESSIONALS, INC. (Washington, D.C.)—To serve as a Wallace communications partner.	\$100,000	\$100,000	\$0	\$100,000	\$0

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
CHAMBER MUSIC AMERICA, INC. (New York City)—To serve as a Wallace communications partner.	\$100,000	\$100,000	\$0	\$100,000	\$0
DANCE USA (Washington, D.C.)—To serve as a Wallace communications partner.	\$100,000	\$100,000	\$0	\$100,000	\$0
OPERA AMERICA, INC. (New York City)—To serve as a Wallace communications partner.	\$100,000	\$100,000	\$0	\$100,000	\$0
RESNICOW + ASSOCIATES INC. (New York City)—To support Wallace’s communications efforts in the arts.	\$293,938	\$52,000	\$16,613	\$232,086	\$45,239
SLOVER LINETT AUDIENCE RESEARCH INC. (Chicago)—To study attitudes about the arts during the pandemic, especially among people of color.	\$464,084	\$0	\$0	\$443,010	\$21,074
SOCIAL SCIENCE RESEARCH COUNCIL (New York City)—To match research fellows with organizations participating in Wallace’s new arts efforts and to support their work.	\$1,927,000	\$1,927,000	\$0	\$115,728	\$1,811,272
SOUTHERN METHODIST UNIVERSITY (Dallas)—To help inform the development of a new arts initiative by learning about financially lucrative arts activities, especially among arts organizations of color.	\$67,600	\$0	\$16,900	\$50,700	\$0
TECHNICAL DEVELOPMENT CORPORATION (Boston)—To gauge the potential impacts of the COVID-19 crisis on arts organizations.	\$117,969	\$0	\$81,163	\$36,806	\$0
THEATRE COMMUNICATIONS GROUP, INC. (New York City)—To serve as a Wallace communications partner.	\$100,000	\$100,000	\$0	\$100,000	\$0
THE UNIVERSITY OF TEXAS AT AUSTIN (Austin)—To study the Building Audiences for Sustainability initiative.	\$4,177,008	(\$167,922)	\$2,400,000	\$359,512	\$1,417,496
OTHER RELATED EXPENSES —Activities including the production and dissemination of Wallace knowledge products.	\$51,500	\$6,500	\$16,500	\$35,000	\$0
	\$8,890,839	\$2,797,878	\$3,114,505	\$2,387,071	\$3,389,261

YOUTH ARTS INITIATIVE

This effort aims to help raise the quality and availability of arts education for children and teens.

BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM (Madison, Wis.)—To study issues, opportunities and questions facing the field of youth arts learning.	\$200,000	\$0	\$0	\$160,566	\$39,434
BOYS & GIRLS CLUBS OF AMERICA (Atlanta)—To develop and run high-quality, year-round arts programming for young people.	\$9,333,087	\$483,087	\$8,121,250	\$1,086,837	\$125,000
HOME TRAINING INSTITUTE, INC. (East Point, Ga.)—To support the Boys & Girls Clubs of America’s Youth Arts Initiative and to manage its learning communities.	\$1,062,071	\$0	\$761,471	\$300,600	\$0
NEXT LEVEL STRATEGIC MARKETING GROUP (Pleasantville, N.Y.)—To help manage the Youth Arts Initiative.	\$517,691	\$90,000	\$206,025	\$221,666	\$90,000

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA AT IRVINE (Irvine, Calif.)—To develop a framework that describes, analyzes and offers a design for 21st century arts learning.	\$1,735,250	\$0	\$0	\$206,967	\$1,528,283
RESEARCH FOR ACTION, INC. (Philadelphia)—To conduct an evaluation of the Youth Arts Initiative.	\$1,300,000	\$0	\$750,000	\$450,000	\$100,000
YOUTH RADIO (Oakland, Calif.)—To study ways in which the COVID-19 pandemic is affecting arts learning and how arts learning could help ease the pandemic's effects on young people.	\$100,000	\$0	\$49,870	\$49,130	\$1,000
	\$14,248,099	\$573,087	\$9,888,616	\$2,475,766	\$1,883,717

**COMMUNICA-
TIONS**

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
ACRONYM MEDIA (New York City)—To provide search-engine-marketing services and consultation.	\$732,213	\$0	\$360,144	\$370,271	\$1,748
BIG THINK STUDIOS (San Francisco)—To manage print and banner advertising, develop creative concepts and purchase advertising for Wallace.	\$149,999	\$0	\$0	\$149,999	\$0
EDITORIAL PROJECTS IN EDUCATION, INC. (Bethesda, Md.)—To support Education Week.	\$1,300,000	\$1,300,000	\$0	\$650,000	\$650,000
EDUCATION WRITERS ASSOCIATION (Washington, D.C.)—To support reporting on school leadership, and summer and expanded learning.	\$250,000	\$250,000	\$0	\$122,098	\$127,902
THE HATCHER GROUP, INC. (Bethesda, Md.)—To provide communications services to disseminate ideas and information generated from Wallace's efforts.	\$626,763	\$0	\$0	\$575,425	\$51,338
KENNESAW STATE UNIVERSITY FOUNDATION, INC. (Kennesaw, Ga.)—To support Youth Today.	\$200,000	\$200,000	\$0	\$200,000	\$0
MODERN CRAFT INC. (Vancouver, British Columbia)—To create content strategy to help inform Wallace's website redesign.	\$108,000	\$0	\$0	\$90,000	\$18,000
NATIONAL PUBLIC RADIO, INC. (Washington, D.C.)—To support NPR and its coverage of education and the arts.	\$1,650,000	\$1,650,000	\$0	\$1,650,000	\$0
TEACHERS COLLEGE, COLUMBIA UNIVERSITY (New York City)—To support The Hechinger Report.	\$200,000	\$200,000	\$0	\$200,000	\$0
OTHER RELATED EXPENSES —Web design and editorial services.	\$180,537	\$0	\$83,099	\$88,500	\$8,938
	\$5,397,512	\$3,600,000	\$443,243	\$4,096,293	\$857,975

**SERVICE TO
THE FIELD OF
PHILANTHROPY**

	TOTAL AS OF 12/31/20	APPROVED 2020	PAID BEFORE 2020	PAID 2020	FUTURE PAYMENTS
ASIAN AMERICAN-PACIFIC ISLANDERS IN PHILANTHROPY, INC. (Oakland, Calif.)—To support this organization, which is dedicated to the full civic and economic participation of Asian-Americans and Pacific Islanders.	\$50,000	\$50,000	\$0	\$50,000	\$0
ASSOCIATION OF BLACK FOUNDATION EXECUTIVES, INC. (New York City)—To support this organization, which advocates for responsive investments in Black communities.	\$20,000	\$20,000	\$0	\$20,000	\$0
CANDID (New York City)—To support this organization (a merger of the Foundation Center and GuideStar), which works to increase knowledge about philanthropy.	\$50,000	\$50,000	\$0	\$50,000	\$0
CENTER FOR EFFECTIVE PHILANTHROPY, INC. (Cambridge, Mass.)—To support this organization, which seeks to help foundations improve their performance.	\$100,000	\$100,000	\$0	\$100,000	\$0
CENTER FOR EVALUATION INNOVATION INC. (Washington, D.C.)—To support the Evaluation Roundtable, which offers a forum for philanthropies to exchange ideas and information about philanthropic evaluation.	\$50,000	\$50,000	\$0	\$50,000	\$0
THE COMMUNICATIONS NETWORK (Naperville, Ill.)—To support this nonprofit membership organization, which provides resources, guidance and leadership to advance communications in philanthropy.	\$12,500	\$12,500	\$0	\$12,500	\$0
COUNCIL ON FOUNDATIONS, INC. (Washington, D.C.)—To support this membership organization, which works to improve the ethics and effectiveness of philanthropy, and to sponsor its public policy summit.	\$33,602	\$33,602	\$0	\$33,602	\$0
EDUCATION COMMISSION OF THE STATES (Denver)—To support the work of the Arts Education Partnership.	\$10,000	\$10,000	\$0	\$10,000	\$0
FUNDERS FOR LESBIAN AND GAY ISSUES, INC. (New York City)—To support this organization, which works to increase the scale and impact of philanthropic resources aimed at enhancing the well-being of lesbian, gay, bisexual, transgender and queer communities.	\$15,000	\$15,000	\$0	\$15,000	\$0
GRANTMAKERS FOR EDUCATION (Portland, Ore.)—To support this membership organization for private and public philanthropies that support improved education outcomes for students from early childhood through their higher education years.	\$24,200	\$24,200	\$0	\$24,200	\$0
GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS (Washington, D.C.)—To support this national membership organization, which promotes learning among funders committed to building effective nonprofits.	\$14,000	\$14,000	\$0	\$14,000	\$0
GRANTMAKERS IN THE ARTS (New York City)—To support this nonprofit membership organization, which provides leadership and services to advance the use of philanthropy for arts and culture.	\$173,190	\$173,190	\$0	\$173,190	\$0

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
HISPANICS IN PHILANTHROPY (Oakland, Calif.)—To support this organization, which works to strengthen Latinx communities.	\$27,250	\$27,250	\$0	\$27,250	\$0
INDEPENDENT SECTOR (Washington, D.C.)—To support this organization, which works to strengthen the nonprofit and philanthropic communities.	\$24,850	\$24,850	\$0	\$24,850	\$0
INTERNATIONAL SOCIETY OF THE LEARNING SCIENCES (Bloomington, Ind.)—To help the society ensure equity in its work, particularly in its support of emerging scholars from historically marginalized backgrounds.	\$225,000	\$0	\$75,000	\$0	\$150,000
NATIONAL GUILD FOR COMMUNITY ARTS EDUCATION INC. (New York City)—To support this organization, which works to develop leaders, strengthen organizations and advocate for community arts education.	\$25,000	\$25,000	\$0	\$25,000	\$0
NATIONAL PUBLIC EDUCATION SUPPORT FUND (Washington, D.C.)—To support the Education Funder Strategy Group and Grantmakers for Thriving Youth.	\$50,000	\$50,000	\$0	\$50,000	\$0
NATIVE AMERICANS IN PHILANTHROPY (Washington, D.C.)—To support this organization, which works to promote equitable and effective philanthropy in Native communities.	\$28,000	\$28,000	\$0	\$28,000	\$0
NEW YORK UNIVERSITY STEINHARDT SCHOOL OF CULTURE, EDUCATION AND HUMAN DEVELOPMENT (New York City)—To support the Research Alliance for New York City Schools.	\$100,000	\$100,000	\$0	\$100,000	\$0
NONPROFIT NEW YORK, INC. (New York City)—To support this organization, which serves nearly 1,700 nonprofits in New York City, Long Island and Westchester County, N.Y.	\$1,000	\$1,000	\$0	\$1,000	\$0
PEAK GRANTMAKING, INC. (Washington, D.C.)—To support this national organization, which seeks to improve grantmaking by advancing the knowledge, skills and abilities of grants managers.	\$9,250	\$9,250	\$0	\$9,250	\$0
PHILANTHROPY NEW YORK, INC. (New York City)—To support this professional community of philanthropic foundations based in the New York region.	\$49,250	\$49,250	\$0	\$49,250	\$0
SOCIETY FOR RESEARCH ON EDUCATIONAL EFFECTIVENESS (Washington, D.C.)—To support this organization, which works to advance and disseminate research on the effects of education practices, interventions, programs and policies.	\$8,000	\$8,000	\$0	\$8,000	\$0
SOCIETY FOR RESEARCH ON EDUCATIONAL EFFECTIVENESS (Washington, D.C.)—To help the society ensure equity in its work, particularly in its support of emerging scholars from historically marginalized backgrounds.	\$225,000	\$0	\$75,000	\$0	\$150,000
TIDES CENTER (San Francisco)—To support Emerging Practitioners in Philanthropy, a national network of foundation professionals and others who strive for excellence in philanthropic practice.	\$17,500	\$17,500	\$0	\$17,500	\$0
WILLIAM MARSH RICE UNIVERSITY (Houston)—To support the National Network of Education Research-Practice Partnerships.	\$50,000	\$50,000	\$0	\$50,000	\$0

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
WOMEN'S FUNDING NETWORK (San Francisco)—To support this funding alliance dedicated to gender equality and justice.	\$10,000	\$10,000	\$0	\$10,000	\$0
OTHER RELATED EXPENSES —To pay for membership dues to service-to-the-field organizations.	\$84,208	\$84,208	\$0	\$84,208	\$0
	\$1,486,800	\$1,036,800	\$150,000	\$1,036,800	\$300,000

OTHER GRANTS

	TOTAL AS OF 12/31/21	APPROVED 2021	PAID BEFORE 2021	PAID 2021	FUTURE PAYMENTS
CENTER FOR DISASTER PHILANTHROPY, INC. (Washington, D.C.)—To support humanitarian aid efforts in the wake of winter storms in Texas and Oklahoma.	\$250,000	\$250,000	\$0	\$250,000	\$0
FSG, INC. (Boston)—To help develop a guide to philanthropic strategy for Wallace staff members.	\$50,000	\$50,000	\$0	\$50,000	\$0
NELSON MULLINS RILEY & SCARBOROUGH LLP DBA EDUCATIONCOUNSEL LLC (Washington, D.C.)—To provide policy and strategy support to advance Wallace's work at the federal and state levels.	\$380,000	\$0	\$165,000	\$200,000	\$15,000
EMPLOYEE MATCHING GIFTS AND GIFTS IN HONOR OF RETIRING EMPLOYEES	\$163,517	\$2,000	\$0	\$104,691	\$58,826
OTHER RELATED EXPENSES —Research services.	\$22,141	\$0	\$13,975	\$8,166	\$0
REFUNDS	\$0	\$0	\$0	(\$503,406)	\$0
	\$865,658	\$302,000	\$178,975	\$109,450	\$73,826
GRAND TOTAL	\$141,457,607	\$44,723,766	\$52,179,431	\$52,671,461	\$36,433,213

FIND OUT MORE

Would you like to find out more about The Wallace Foundation? Please visit our website at www.wallacefoundation.org, where you can learn about the foundation's:

- Mission: <http://www.wallacefoundation.org/about-wallace/Pages/Mission.aspx>
- How We Work With Grantees: <http://www.wallacefoundation.org/how-we-work/how-we-work-with-grantees/Pages/default.aspx>
- Funding Guidelines: <http://www.wallacefoundation.org/about-wallace/Pages/Funding-Guidelines.aspx>
- People: <http://www.wallacefoundation.org/about-wallace/People/Pages/default.aspx>
- History: <http://www.wallacefoundation.org/about-wallace/Pages/History.aspx>



Our mission is to foster equity
and improvements in learning and
enrichment for young people, and in
the arts for everyone.

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