



The Wallace Foundation®

MINDING THE (KNOWLEDGE) GAP
REPORT '14



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Designed by José Moreno

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AMERICAN PHILANTHROPY: CONTRIBUTING TO THE COMMON GOOD



Although they are growing in all parts of the world, philanthropic foundations remain an especially American phenomenon.

The reasons may be both practical, for example our tax laws, but also cultural. As Alexis de Tocqueville observed in 1835, we take seriously the idea of private actions for the common good—or as he put it, “self-interest, rightly understood.” Going back to Colonial barn-raising and mutual benefit societies, the impulse to create a strong civic sector to help others, working both outside and with government, runs deep.

Foundations are an important part of the sector, and vary widely in their areas of interest, their goals and their approaches. For the past 15 years or so, The Wallace Foundation has taken an unusual path to providing value. We work intensively with a small number of partners, and then harness and disseminate insights from their work to help their entire field.

We continue to refine this approach. Today, we think of our work as an ongoing cycle: understanding the context to identify a question that, if answered, could propel field progress; generating improvements and insights; and then catalyzing broad impact by sharing those insights widely.

We think this approach makes sense on three grounds.

- Given our limited assets relative to the need, we can deliver additional value through knowledge to organizations beyond those we are able to fund directly.
- Since the fields we work in, including education, arts and afterschool, often lack resources to invest in field-wide learning, we can help fill that gap.
- Finally, through that field-wide learning, we can help many organizations be cost-effective by spending scarce dollars on what works.

Much of our work historically has focused on improving practice in the field. As Will Miller notes in his essay, the foundation is beginning to take steps to be more intentional and systematic in its approach to policy, doing so under the principle that we say more only as we know more. In other words, we will recommend policy approaches only when there is evidence behind them.

Whether we seek to improve practice or policy, our efforts have two principles in common. We base these efforts on learning—rooted in hard evidence—about what works, what doesn't and why; and, a belief that what works in one context may need to be modified for another. By bearing these in mind, we think we can responsibly contribute to the common good with the ideal in mind that animated American philanthropy: That when everyone has greater opportunities, we all benefit. ■

A handwritten signature in dark ink, appearing to read "Kevin W. Kennedy". The signature is fluid and cursive, written in a professional style.

Kevin W. Kennedy, Chairman

MIND THE (KNOWLEDGE) GAP: ONE FOUNDATION'S APPROACH TO CONTRIBUTING TO SOCIAL BENEFITS



The Wallace Foundation is an endowed private foundation that is not seeking to raise additional funds. As such, we have a limited set of resources with which to pursue our mission of fostering improvements in learning and enrichment for disadvantaged children and the vitality of the arts for everyone. As stewards of finite resources, we feel called to try to maximize the social benefits created by their use. The primary way we do this is by funding grantees to provide direct benefits to the children and audiences we seek to serve and to strengthen those organizations' ability to sustain this work. At the same time, we also ask ourselves: How can The Wallace Foundation add value beyond that created by the work of the grantees we fund directly?

THE CHALLENGES OF SCALE

An important aspect of this question of “value added” is grappling with the challenges of aiming for impact at a national scale. Why is scale so difficult for national foundations?

The first challenge is: This is America, a pluralistic representative democracy.

Given the origins of our system of government in the compromises hashed out between the Jeffersonian insistence on states' rights and Hamiltonian belief in the need for a strong central government, we have authority that is deliberately distributed among and kept in check by competing interests.

Solutions and policies emerge from complex interactions in which many different voices play important roles—different levels of government, political parties, civic leaders, businesses, nonprofits, advocates, and so on.

Because context is so important, policy approaches play out differently in every community.

Further, nationwide and local efforts are often in tension; the debate over the Common Core is one example of that today.

As Charles Lindblom, professor emeritus of political science and economics at Yale, put it, “No other nation fragments policy making to the extent achieved by U.S. constitutional arrangements and political customs.”

Another challenge to philanthropic impact at scale is that within this large and complex ecosystem even the largest foundations are relatively small players.

Take just two of the broad fields in which The Wallace Foundation operates: education and the arts.

This essay is based on a talk given on Feb. 25, 2015 at the Center for the Study of Philanthropy and Voluntarism at the Duke University Sanford School of Public Policy.

- In K-12 public education, foundation funding accounts for less than half a percent of total spending.
- In the arts, it's larger but still a modest 9.5 percent, according to a 2012 study by the National Endowment for the Arts.

Clearly there are many actors to reach if we are going to make a contribution at scale in these two areas: 15,000 school districts, nearly 50,000 arts organizations counted by the Urban Institute, and the countless stakeholders who influence them.

The counterargument, of course, is that foundation grants represent discretionary funds. Because so much of the funding for school districts and arts organizations is restricted in its use, discretionary grants can be especially useful to fund new ideas, providing the opportunity for additional leverage beyond the simple proportion of total dollars.

Nonetheless—and this is undoubtedly a good thing—these data suggest it is very hard for foundations or any philanthropist from Bill Gates to the Koch Brothers to simply “buy” an outcome they view as a social advance organization by organization. No one has enough money to cover the field.

MANY APPROACHES

Foundations have taken different approaches to the riddle of scale with varying degrees of success.

To cite only a few examples, the Edna McConnell Clark Foundation carefully selects youth serving organizations with strong evidence of their impact and the potential to expand significantly, then invests in sound business planning, aggregates growth capital to implement the plan, and tracks its performance. The F.B. Heron Foundation, a leader in mission-related investing dedicated to helping people and communities help themselves out of poverty, focuses primarily on investing in enterprises that create reliable income streams for low-income people. Lumina Foundation seeks to increase the proportion of Americans with high-quality degrees, certificates and other credentials to 60 percent by 2025 through a multi-faceted strategy that includes: investing in local collaborative partnerships; data-based practices and performance-based models in higher education; changes in state and federal policy; new forms of student finance; and the development of postsecondary credentials.

Of course, there are many more models for seeking impact at the national level, as thoughtfully described by Joel Fleishman in his book *The Foundation: A Great American Secret*.¹

In a pluralistic society, we benefit from having a multitude of organizations taking different approaches. Despite the wide variation in strategy, at least to my mind, foundations can be divided into two broad groups.

In the first group, the focus is on the strategies of the grantees. The foundation acts like an investor to try to scale up what nonprofit organizations have figured out they are able to do effectively, as Edna McConnell Clark does. The key here is a careful selection process, which can be made on the basis of need, promise, demonstrated excellence that is worthy of expansion, or some combination of the above.

In the second group, the strategies pursued are primarily those of the foundation, acting more like an entrepreneur, seeking to address a problem at the level of an entire field nationally. Here, foundations take a more active role among the cadre of change agents, as Lumina does.

“We have the opportunity to leverage the use of our resources with the power of useful knowledge to seek broad impact across the country, helping many more children and organizations than we have the resources to fund directly.”

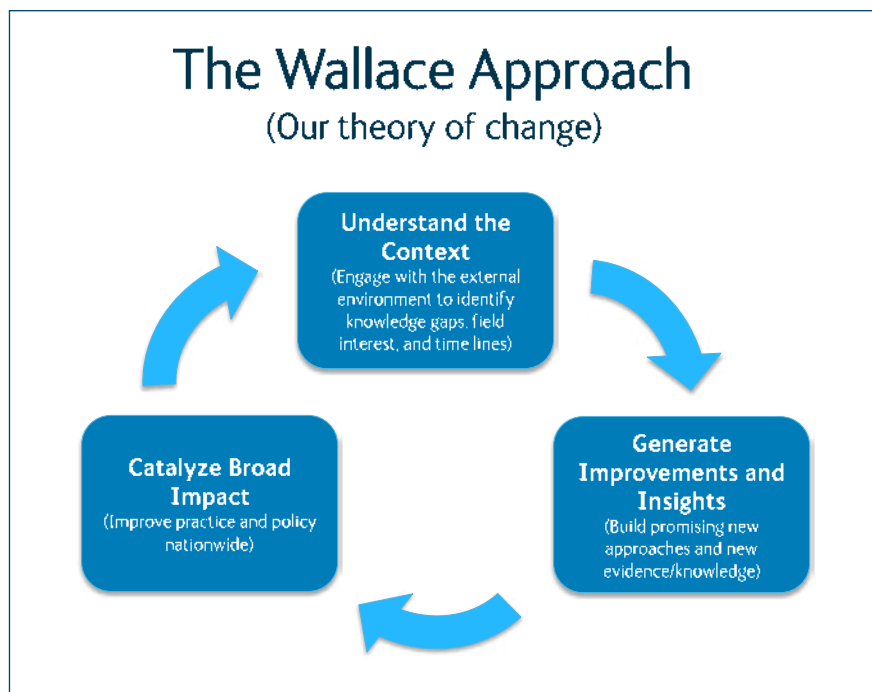
Wallace is in the latter camp, with a special emphasis on tackling problems where the solution is not yet known either because we don’t know what works or we don’t know how to implement a successful program or practice in different settings.

OUR APPROACH

We have a common strategic approach or “theory of change” that underlies all our initiatives and strategies. It is grounded in a belief that we have the opportunity to leverage the use of our resources with the power of useful knowledge to seek broad impact across the country, helping many more children and organizations than we have the resources to fund directly.

I am using the term “knowledge” here the way knowledge management experts Ikujiro Nonaka and Hirotaka Takeuchi define it:² “Justified true belief that increases an entity’s capacity for effective action.” In other words, the insights need to be justified through evidence; they should correspond with reality; and they must help people be more effective. While we respect those who pursue knowledge for knowledge’s sake, because we are interested in impact at scale, we seek the kind of knowledge that leads to effective action in policy, practice or both.

Of course, we recognize that, as Michael Lipsky, a distinguished senior fellow at the Demos public policy organization, has argued, “policy implementation in the end comes down to the people who actually implement it.”³ Because the effectiveness of policy and practice in the field is heavily influenced by the context in which it operates, that is where we start.



Our aim in trying to understand the context is to identify what we call a high-leverage knowledge gap—that is, a significant question whose answer is not known but which, if known, could help propel social progress broadly.

Next, we work with our grantees and other partners to help close the knowledge gap by:

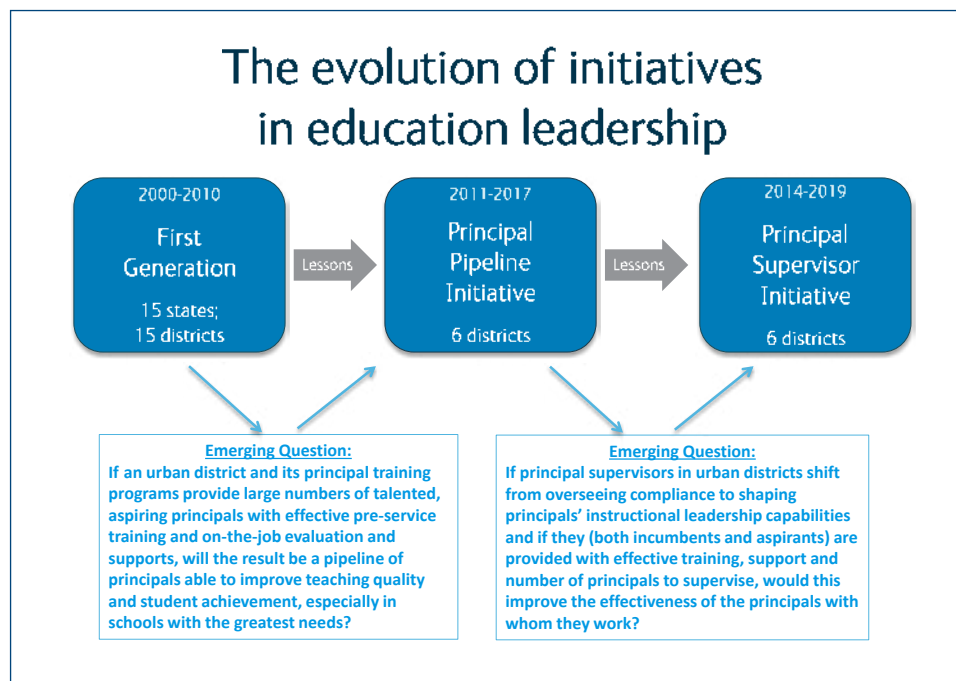
- First, helping to test new ideas and generate improvements for those our grantees serve, and
- Second, generating insights and evidence on what works and does not work that others can use to spread the benefit more widely.

Since the credibility of the evidence is a critical factor in catalyzing broad impact, we work with independent analysts and researchers to create robust and useful insights and data.

We then seek to widely share the knowledge we and our partners have created in ways that lead to improvements on a much larger scale than we can fund directly.

We think of our approach as a cycle because experience has shown that what we learn in one round of this process often leads to new important unanswered questions that become the focus of additional initiatives or rounds of grants.

This cycle is easiest to understand with an example. Here is one from our work in education leadership.



When we started working in this area, the role of the principal was seen essentially as a facilities manager primarily responsible for buses, boilers and budgets.

Our foundation spent about \$300 million from 2000 to 2010 exploring whether principals matter in improving schools, what the characteristics of an effective principal are, and how to teach them.

Research we funded demonstrated that an effective principal—a true instructional leader—can be a driver of student achievement, second only among school-based factors to the quality of teaching in the classroom. Importantly, the quality of the principal is the single most important factor in whether or not high-quality teachers stay in high-needs schools. Further, we learned that principal training programs designed around this evidence base were able to demonstrate these skills could be taught.

But these findings suggested a new question for a second learning cycle: How could school districts build a pipeline of effective principals and, if they did, would it improve teaching and learning at the scale of an entire district?

This led to our Principal Pipeline Initiative, shown in the central blue box, in which we are funding six large urban districts to implement the elements research suggests are required for impact at the scale of district and to participate in a rigorous study of the effort's effects. We are about two-thirds of the way through this six-year, \$80 million initiative.

This work has already spun out a third learning cycle. As the Pipeline districts' work progressed, we learned that a stumbling block to improving the performance of principals was their supervision. Having spent their careers as principals in the old model, current supervisors often lack the training and experience to move from a primary focus on compliance to helping principals improve instruction in the classroom.

This has led us to launch a new initiative before the current one is complete with six additional districts seeking to answer the question: "If principal supervisors shift from overseeing compliance to shaping principals' instructional leadership capabilities ... would this improve the effectiveness of the principals with whom they work?"

CHALLENGES TO OUR APPROACH

A knowledge-based philanthropic approach is not without its challenges and its skeptics, so let me turn to why some might think it a bit hubristic of us to be trying this.

Through reading publications of both supporters and critics of the sector, and conversations with colleagues, grantees, researchers, and many others, we've identified a number of challenges. The three we consider most important are:

1. Strategic philanthropy is ineffective;
2. Foundations should back the vision of great nonprofit leaders; and
3. Policymakers and practitioners ignore evidence.

Let's begin with the first. Some critics of philanthropy, including William Schambra of the Hudson Institute, contend that the history of philanthropy suggests any foundation strategy that seeks to produce a measurable result will add little value to society. This may be a problem of holding foundation strategies to a standard of causal connection that I would agree it would be futile to insist on. Given the pluralistic, complex and large systems in which we operate, it is a fool's errand to try to attribute a social improvement directly to the actions of a single foundation.

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However, if you take what I believe is the more rational approach of seeking to identify contribution to social improvement, then the case for strategic philanthropy is much stronger. Joel Fleishman’s book provides many useful examples, so let me just mention one to provide an example of the effective combination of investments in innovation, research and communication.

The Robert Wood Johnson Foundation⁴ funded experiments to see whether higher state cigarette taxes discouraged smoking; they did, especially among youth. RWJF’s communications and policy engagement efforts based on these findings contributed to many states raising cigarette taxes. Today, smoking rates among high school students are at their lowest level since tracking began in 1991, according to the Centers for Disease Control. Can we attribute this solely to RWJF? Of course not. Did RWJF make a significant contribution to this improvement? Clearly.

A variant of the “strategic philanthropy is a waste of time and money” argument is the critique that far more good would be accomplished if foundations simply backed the vision of great leaders in the nonprofit sector—and essentially got out of the way. I believe this can be an effective strategy for certain issues, especially when the leading providers in a sector have programs or processes that have been proven effective. At the same time, there are several reasons to believe there are limits to the idea that all foundations should simply serve as selective providers of funding to the most effective nonprofits.

For example, it’s not always clear that nonprofits, any more than foundations or other experts, have all the answers they need, and that what is missing is simply money. Knowledge gaps are a real and persistent challenge in many social sectors.

Further, simply funding great leaders or good ideas in isolation without a learning effort may miss the chance to benefit society or a field more broadly. New insights and knowledge—from evaluations, implementation studies, peer learning communities, and other learning strategies—offer the potential to leverage the impact at greater scale.

That said, a knowledge-based approach has to grapple with the view that evidence is ignored in the policy setting process and by many practitioners or—to paraphrase William Schambra—the belief that measurement hasn’t tamed politics; politics has coopted measurements.⁵

This critique seems most powerful if you assume a linear view of evidence’s role in policy formation, one that envisions a kind of cause and effect relationship between evidence and subsequent policy. A research study is done identifying a problem, another study identifies a solution, the issue is taken up and new laws and policies are created. As I suspect most of us have experienced, this is an oversimplification.

In the 1980s, Carol Weiss of Harvard’s Graduate School of Education advanced the study of research utilization⁶ by suggesting that the reality of the use of evidence in policymaking is more iterative and interactive. A complex policy analysis doesn’t always suggest a single solution. Local differences can and often do overwhelm policy or program design. Policy typically involves value judgments, which differ among policymakers. Policy is often highly influenced by the moving personal stories of the individuals it is designed to benefit.

We believe it makes sense to ground an evidence-based scale strategy on this more interactive view, where research intersects with other information, values and institutions.

Fortunately, there is **evidence that evidence matters**, even in politics.

In a 2009 study of 98 issues debated in two sessions of Congress, scholar Frank R. Baumgartner⁷ and his colleagues found evidence is an important part of policy debates, as shown in the chart below.

Arguments used in policy debates

Analysis of 98 issues across two sessions of Congress
based on 315 interviews of government officials and advocates

	Status quo defenders	Status quo challengers
Problems (or lack of problems) with implementation or feasibility	69%	74%
Promotes (or inhibits) a goal	59%	65%
Imposes (or reduces) costs on nongovernmental actors	48%	57%
Equality of treatment (or discriminatory impact)	39%	42%
Positive (or negative) nonfinancial consequences	44%	34%

Source: *Lobbying and Policy Change: Who Wins, Who Loses, and Why*, Baumgartner, et al. 2009

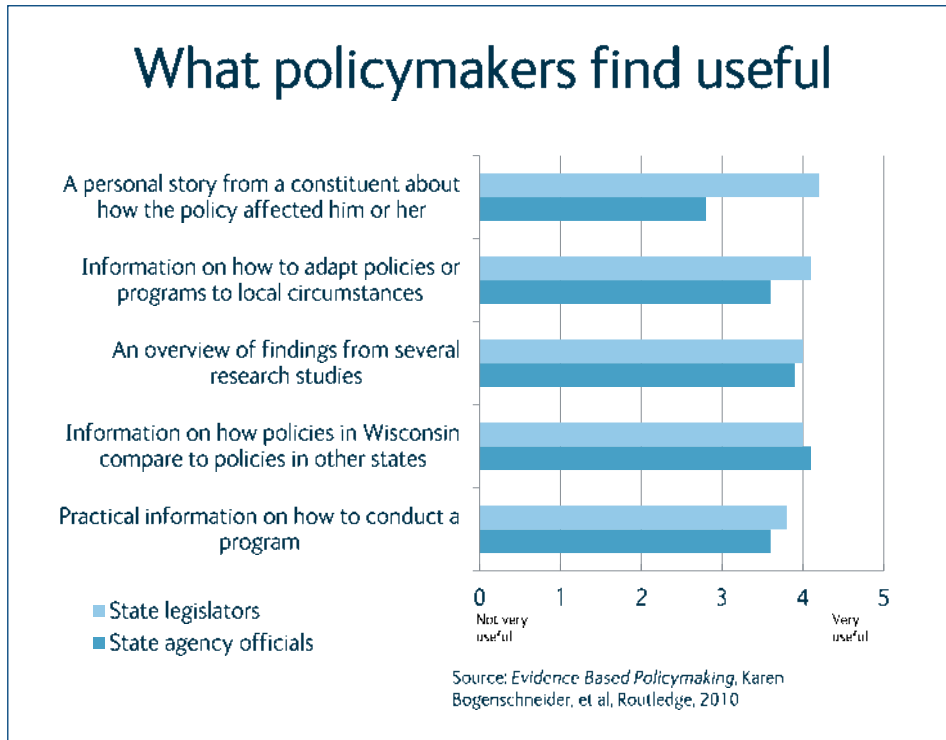
The most frequent topics of debate were whether the evidence suggests a solution can be implemented and whether it would do good or harm.

These same arguments—albeit with different evidence and/or different conclusions—were made by each side.

Baumgartner noted that, “Like or not, advocates on both sides on a given issue must address important questions of cost and feasibility if these are raised. There is precious little evidence that [policy actors] can choose freely their arguments without constraints....”

In other words, legislators and lobbyists can’t persuasively argue their points on the basis of ideology or values alone, so they turn in part to evidence to make them.

A separate 2010 study of two sessions of the state legislature in Wisconsin led by scholar Karen Bogen Schneider⁸ came to similar conclusions. It included a survey of state legislators and agency officials regarding the information they find most useful. Not surprisingly, anecdotal evidence—that personal story from a constituent—ranked highest with legislators and lowest with agency officials. Agency officials valued benchmarking information, that is how policies in other states compare with their own, most highly.



Although evidence from research is not the only kind of information that matters, it does matter—and, in the case of state agency officials, matters more than moving personal stories.

Bogenschneider and her colleagues also studied what makes research most helpful to legislators and agency officials. The two most important factors were scientific quality and unbiased conclusions. For this reason, we work very hard to make sure what we say will stand up to scrutiny.

Policymakers also value clear writing and summaries—two objectives for our quality review process for any publication that we post on our website.

Having research available at the time decisions are being made is also important to policymakers. Although we are working on it, we have a harder time with this issue, in no small part because of the time and attention we put into ensuring the evidence we disseminate is credible, unbiased, and presented in forms our target audiences will find understandable and useful.

Lindblom, whom I cited earlier, summed up the evidence on use of research in policy as follows: Research is likely not going to be the main influence—but credible evidence “can help to broaden the range of changes under consideration and can help to deepen political debates about problems, opportunities and policy options.”

INFLUENCING PRACTICE

We’ve been talking about policy so far, but the area where Wallace has arguably had more influence in is the world of practice.

One reason is that there is, often, less partisanship when it comes to questions of implementation. As New York Mayor Fiorello LaGuardia famously once said: “There is no Republican way of cleaning streets any more than there is a Democratic way of putting out a fire.”

In a 2013 book called *If Mayors Ruled the World*⁹, Benjamin Barber argued that “local executives exhibit a non-partisan and pragmatic style of governance that is lacking in national and international halls of power.”

Viewed through the lens of practice at the local level, reaching scale can be seen as the process by which insights and innovations are adapted and diffused nationally.

Our approach reflects the insights of Everett Rogers, who developed the theory of the diffusion of innovations.

He noted that people do not adopt an innovation they have not heard of, so effective communication that reaches target audiences is a key. To spur adoption, it helps to shine a light on the characteristics of an innovation that promote its take up: relative advantage over alternatives, compatibility with current practices, and simplicity. The theory suggests innovations spread more quickly when they are observable and practitioners can test them before adopting them wholesale. His work also indicates we need to pay attention to the existing policies and incentives at both the organizational and the system level and how our new evidence interacts with them.

All of this has implications for our tactics.

Because different kinds of research activity and publications are more effective in addressing different aspects of policy and practice issues, we have to go well beyond what’s traditionally thought of as the model for research in the foundation world—the outcomes evaluation—as important as it is.

We also fund literature reviews, implementation studies, cost studies, and market research. When we feel we have enough insights and evidence to make a contribution, Wallace will step back and publish a synthesis of what is known to date, which we call a “Perspective.” These have been some of our most popular downloads from our website.

ALIGNING OUR OPERATING MODEL TO OUR APPROACH

For any organization to implement a strategy successfully, it must align its operating model with the key success factors of that strategy.

The starting point for our operating model is the observation that our approach requires expertise in three distinct disciplines to put into action:

Like many foundations, the first discipline we need is **program**—knowledgeable and capable program officers who know the field well and keep current by remaining in regular conversation with its leaders and influencers to help us understand the evolving context and be able to collaborate with other funders; who know our grantees well enough to help us structure partnerships that are aligned with the mission and realities of the organizations we fund and that will also generate insights and evidence; and who know how to overcome challenges as they arise by making course corrections, identifying needed technical assistance, and building relationships among grantees and their peers.

The second discipline we need is **research**—a staff of experts in research, evaluation and policy analysis—if we are going to capture the credible, unbiased evidence of insights and improvement as they are generated. While our staff members do not perform the research or evaluations themselves, their expertise in structuring and managing the contracts with third-party research organizations is critical to the results of those studies being both credible and useful.

The third essential discipline is **communications**—people capable of effectively disseminating what we learn to different target audiences so that the information actually influences policy and practice; people capable of putting Everett Roger’s theories of the diffusion of innovations to practical use in the field to catalyze broad impact.

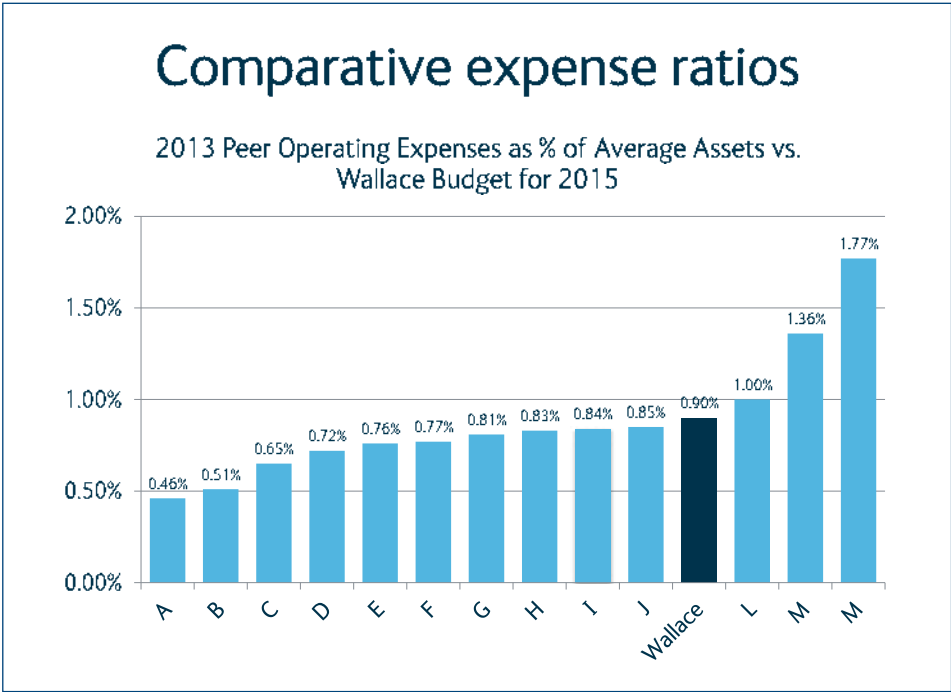
Over the years, we have found that our programmatic strategies and initiatives are most effective when they are designed from the beginning with all three sets of expertise—program, research and communications—in mind. For this reason, nearly everything we do is planned and implemented in interdisciplinary teams with members from each of the three disciplines involved from the beginning.

Beyond staffing and our work in inter-disciplinary teams, there are several other features of our operating model intended to align it with our strategy:

- We make longer and larger grants compared with peer foundations in order to allow for continuous improvement cycles—necessary because we’re asking our grantee partners to tackle challenges where the solutions are not yet known.
- Our initiatives typically last four to six years to allow for programs to be refined. While we start capturing implementation lessons from the start, we normally want to see the completion of two years or learning cycles before we attempt to measure outcomes.
- Because our initiatives are organized around work addressing a shared knowledge gap, most of our grantees are selected through competitive processes involving requests for proposals. We rarely fund unsolicited submissions.
- While the lion’s share of our charitable disbursements directly support the work of grantees, a larger proportion of our spending is for research and communications than we believe is typical at most foundations our size.
- Finally, we acknowledge that working with Wallace is not for every potential grantee. It is critical to us that we form genuine partnerships with our grantees, where the work simultaneously directly serves beneficiaries we both care about and creates knowledge for impact at scale. These partnerships are labor intensive on both sides. We have to remain vigilant that the burden we place on our grantees is worth it to them and advances their mission as well as ours.

All this has implications for our overhead rate, the amount of our resources spent on our operating budget. To benchmark our overhead rate, we look at how we compare to a peer group of 13 similar national foundations with assets ranging from half to double our size.

Unfortunately, because of how long it takes all of us in the foundation world to file our 990-PFs, the most recent peer information available is for 2013.



We think the most useful way to look at this issue is by examining operating expenses as a percentage of average assets because this approach removes any differences created by different total spending rates. Our operating model puts us at the upper end of a broad middle group of five foundations annually spending between .8 percent and .9 percent of their average assets on overhead, but below the three foundations on the high end of the scale, some of which run facilities or programs more like an operating foundation. If you prefer to look at overhead rates as a percentage of total annual spending, our budgeted 2015 rate of .85 percent of assets is about 17 percent of the 5 percent payout required of private foundations by tax law.

ASSESSING IMPACT

I began with the goal of sharing with you how one foundation approaches the challenge of seeking impact at scale through knowledge.

Now we come to one of the most difficult questions in philanthropy: How’s it going?

In the world of charitable giving, there is no agreed-upon set of measurements of success or failure—such as profitability, return on investment and market capitalization in business or election returns and poll results in politics.

As I mentioned earlier, we understand that progress or the lack thereof cannot be attributed directly to our work. At most, we can attempt to measure our contribution to the results.

So, we look both at changes in the fields in which we work and at how we are seen as contributing to or impeding those changes, in others words, our reputation.

I will start with a review of indicators of field progress in some of our key program areas.

When The Wallace Foundation began working on whether and how the role of the principal could be an important lever for school improvement in the early 2000s, policy experts at the time characterized it as “a tertiary issue at best,” in the words of Jack Jennings, founder of the Center on Educational Policy.

Today, the **policy** picture is quite different, as is evident, for example, in increased federal prominence given principal leadership and reforms of principal education in Illinois and Kentucky.

With support from us, standards for principals based on research findings have been refreshed.

The picture is not uniformly rosy. The author of a Wallace-funded study of state education leadership policy development¹⁰ has observed that when state discussions focus on “teachers and leaders,” the “and leaders” part frequently is tacked on as an afterthought and then substantively ignored downstream as policies are either developed or implemented.

As with all public policy efforts, progress is not so much linear as it is some version of “two steps forward and one step back.”

For example, the Louisiana Department of Education—after a new State Superintendent dropped a focus on leader development for a teacher-only approach—subsequently concluded that trying to improve teacher effectiveness without also focusing on leader effectiveness will not produce the desired results. The Louisiana Board of Regents in 2014 created the Advisory Council for Teacher and Leader Preparation Effectiveness in part in order to restore a more balanced approach.

That’s policy ... in terms of **practice**, we have been able to measure a sharp growth in funding for school leadership initiatives. The maps on the next page chart the work of 15 leading providers of technical assistance on education leadership according to where services are delivered.

The increased number of red dots on the second map shows the expansion in sites from 2003 to 2013.

We believe all this suggests education leadership is now much more widely recognized as an essential ingredient in school improvement than a decade ago.

Summer learning is an area where we’ve been working only since 2011. Nonetheless, there are indications of the desired combination of both direct and national benefits.

We have helped schools systems in Boston, Dallas, Jacksonville, Pittsburgh, and Rochester, N.Y., to scale up district-run voluntary summer programs that combine academics with enrichment so they now serve tens of thousands more disadvantaged children each summer. The quality of these programs has also improved substantially.

Evaluation of the short-term results of one summer’s worth of programming has shown statistically significant improvement in math test scores. Reading gains remain elusive, but the evaluation identified several promising practices for further development and study. The evaluation of longer-term outcomes will unfold over the next several years.

The implementation study we published about the first two years of these programs has already proven its value. A number of schools districts—including Newark and New York City—have used it as a guide to planning their own new summer programs along the lines of this model.

15 TA providers in education leadership: Reach in 2003



Source: Parthenon Group

15 TA providers in education leadership: Reach in 2013

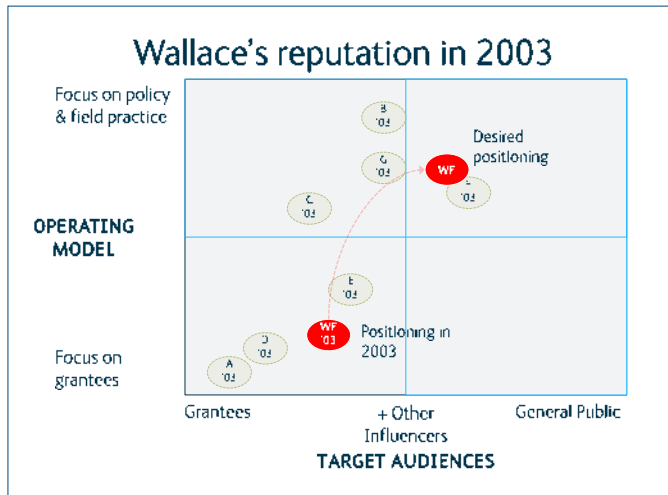


Source: Parthenon Group

In the afterschool arena, we see a similar story. When we began our work in 2002, we could find few examples of cities interested in coordinating the provision of afterschool programs.

In a 2013 study of the 275 U.S. cities with populations of 100,000 people or more, researchers found that at least 77 were coordinating afterschool systems, with a median number of 20 providers included in the city-wide system. However, progress is uneven. The researchers found greater strides being made on setting standards for program quality and the creation of coordinating entities than on establishing common data systems between schools and afterschool providers to help target services more effectively. Only one in five cities uses all three of these coordination strategies.

In addition to tracking field-level changes, we attempt to assess our reputation for contributing to these changes. The chart below summarizes a qualitative analysis by a market research and branding expert of interviews done in 2003 with two dozen leaders of peer foundations, grantees and experts on philanthropy who are familiar with our work. It maps Wallace relative to a set of six large national foundations and one think tank in 2003.

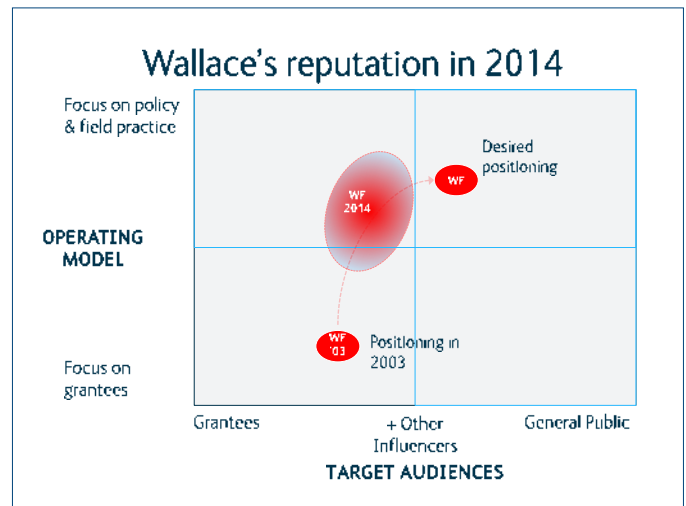


The vertical axis shows how respondents perceived the operating model of each organization—whether it was seen as having a focus solely on those it funds directly or was seen as also having an influence on broader policy and practice in the fields in which it works. The horizontal axis shows which audiences each organization was seen as reaching—mainly grantees on the left, grantees plus other influencers on policy and practice in the middle, and all the way to the general public at the far right.

In 2003 respondents saw us squarely in the lower left quadrant: focused on and speaking mostly to grantees with only modest influence on policy and practice. We set a goal of moving up and to the right, effectively engaging influencers beyond our grantees by becoming seen as a hub for credible and useful knowledge.

In 2014, as shown on the left when our market researcher repeated the study with many of the same interviewees, he concluded we had made considerable progress, but not as far as we desired. His rating is an oval for two reasons:

1. First, we moved most in education leadership and afterschool system building, but less in the arts, where we had not invested as much in this period in catalyzing broad impact.
2. Second, we continued to be perceived as shying away from policy issues relative to the peers in this study. As one respondent said, “I don’t think of [Wallace] as someone who influences policy in the same way that they influence practice.”



While pleased with the movement we have made towards our goal in the last 10 years, we recognize that we could up our game by making progress more evenly across all program areas and engaging more intentionally with policy.

We also participate every two years in a confidential survey of our grantees conducted by a third party, the Center for Effective Philanthropy. This is as close as we can get to a reliable customer satisfaction survey. CEP’s survey is especially valuable because it can compare ratings of Wallace to a database of responses from 40,000 grantees rating more than 300 foundations over 13 years.

How grantees compare us

Database of 40,000+ grantee ratings of 300+ foundations over 13 years

	Percentile
Understanding of the field	98th
Advancing knowledge in grantees’ fields	100th
Foundation impact on your field	82nd
Effect on public policy in grantee fields	81st
Impact on grantees’ communities	14th
Impact on grantee organizations	41st

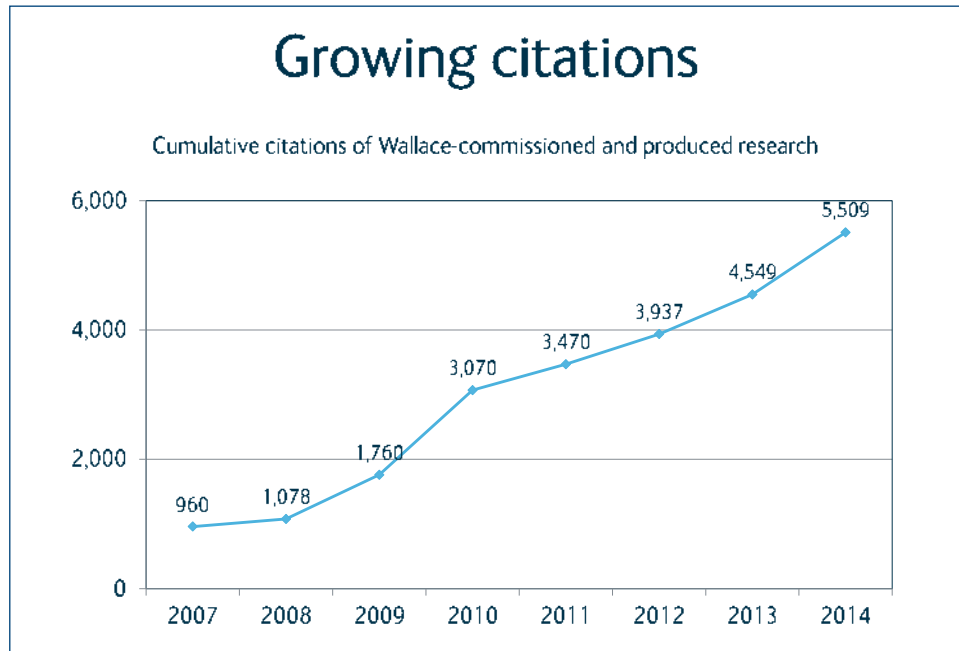
Source: Wallace Foundation Grantee Perception Report, Center for Effective Philanthropy, December 2014

In the most recent survey, whose results are summarized above, we were pleased to see responses well aligned with what we are trying to achieve strategically. Our understanding of the fields in which we work was at the 98th percentile. Our ratings in 2014 for “advancing knowledge in grantees’ fields” was the highest score in the data base’s history. Our grantees rated us at the 81st percentile in affecting public policy in their field, suggesting they see us as more influential in this area than our peer foundations do.

Scores on ratings that are not central to the goals of our strategies—such as having an impact on the communities in which our grantees operate—were much lower. While no one likes to be at the 14th percentile of anything, the rating makes sense given our issue-based strategy.

Of course, it was not all happy news. We scored lower than we would like—slightly below average—for our impact on grantee organizations. These surveys are always helpful in giving us insight into areas where we still have our work cut out for us.

Occasionally, evaluations by our grantees shed light on Wallace’s contributions in an area. In 2014, Edge Research surveyed 46 public education leaders as part of a market research study for the New York City Leadership Academy, a provider of training for principals. One of the items in the survey was an unprompted question about where the respondents go to find out information about school leadership. Wallace was the most frequently cited source.



We use Google Scholar to track scholarly citations of our publications and the research we fund and as one measure of influence on thinking within a field. They, too, are growing.

Like many organizations, we track visitors to our web page as an indicator of how effective our dissemination strategies are. They number about a million a year. We believe downloads—the act of clicking through to get a PDF of a report or view a video—are a more meaningful metric of the usefulness of our website to policymakers and practitioners. Over the last decade, these have risen 20-fold to over half a million annually for the last two years running. These figures do not count downloads from the websites of our research partners, which in cases like RAND can be similar in size.

IN SUM...

In this year’s annual report essay, we have tried to share what we are trying to do to catalyze mission-driven impact broadly, how we go about it, and some of the ways we assess how well it is working. To sum it up, our approach is based on a set of observations, beliefs, and the choices that stem from them:

- We think foundations aiming to contribute at scale face important structural challenges.
- At the same time, there’s a demand for evidence and experience that can help practitioners be more effective in their work, and can help inform policy debates; in both cases, credibility is key.
- A national foundation is in a good position to help provide this kind of information.
- To go this route we believe requires an operating model aligned to these strategic objectives.

While we’d argue that it makes little sense to try to attribute practice and policy change to our work, we have solid data that show Wallace is now regarded as a reliable source of evidence—and good indications that we are contributing to practice and policy improvements.

All this inspires us to keep at it and try to create more and broader benefits in fostering learning and enrichment for disadvantaged children and the vitality of the arts for everyone. ■



Will Miller, President

- 1 *The Foundation: A Great American Secret, How Private Wealth is Changing the World*, Joel L. Fleishman, Public Affairs, 2007
- 2 *The Knowledge-Creating Company: How Japanese Companies Create the Dynamics of Innovation*, Ikujiro Nonaka and Hirotaka Takeuchi, Oxford University Press, 1995
- 3 *Street-level Bureaucracy: Dilemmas of the Individual in Public Services*, Michael Lipsky, Russell Sage Foundation, 1980
- 4 This effort is also described in chapter 4, “Shaping Public Policy as a Robert Wood Johnson Foundation Approach” by James S. Marks and Joseph Alper, in *To Improve Health and Health Care, Volume XII*, The Robert Wood Johnson Foundation Anthology, Stephen L. Isaacs and David C. Colby, Jossey-Bass, 2009
- 5 *Point/Counterpoint: Is Philanthropy Engaging in Magical Thinking?*, William Schambra, May 12, 2012, at Nonprofitquarterly.org
- 6 *Evaluation: Methods for Studying Programs and Policies*, 2nd edition, Carol H. Weiss, Prentice Hall, 1997
- 7 *Lobbying and Policy Change: Who Wins, Who Loses, and Why*, Frank R. Baumgartner, Jeffrey M. Berry, Marie Hojnacki, David C. Kimball, and Beth L. Leech, University of Chicago Press, 2009
- 8 *Evidence-Based Policymaking: Insights from Policy-Minded Researchers and Research-Minded Policymakers*, Karen Bogenschneider, Thomas J. Corbett, Routledge, 2010
- 9 *If Mayors Ruled the World: Dysfunctional Nations: Rising Cities*, Benjamin R. Barber, Yale University Press, 2013
- 10 *Developing Excellent School Principals to Advance Teaching and Learning: Considerations for State Policy*, Paul Manna, The Wallace Foundation, 2015

SCHOOL LEADERSHIP

Research has borne out that leadership is second only to teaching among school-related influences on student learning.¹ School principals create the conditions for great teaching and are the prime factor in determining whether teachers stay in high-needs schools. Accordingly, to shape public schools that give all students what they need to succeed, principals have been called on increasingly in recent years to shift their focus from administrative matters to raising the quality of teaching and learning throughout their schools. But in many school districts, principals receive neither the training nor support they need to make this possible. In response, Wallace has, since 2000, invested in numerous research studies and on-the-ground efforts to bolster school leadership.

New principal standards have been put to work in job descriptions, curricula of preparation programs, and, crucially, in support for aspiring and novice principals.

In 2011, the foundation launched a six-year, \$84-million initiative to help six urban school districts develop a large corps of effective principals by building strong “principal pipelines,” that is, procedures and practices that ensure strong training for aspiring school leaders; rigorous hiring and placement of principals; and sound support and evaluation once they are on the job—all tied together by evidence-based standards that describe what principals need to know and do. Independent researchers are conducting an ongoing study of the effort, which will include an examination of the pipeline’s impact on student achievement and other indicators of school success. The districts are Charlotte-Mecklen-

burg, N.C.; Denver; Gwinnett County, Ga. (near Atlanta); Hillsborough County, Fla. (encompassing Tampa); New York City; and Prince George’s County, Md. (near Washington, D.C.).

OVERVIEW OF 2014 - DEVELOPMENTS AND CHALLENGES

THE PIPELINE

Three years into the effort, the districts are finding that their supports for new principals are having a positive effect. For example, some 88 percent of their novice school leaders believe that the mentoring and professional development they have received has changed the way they work, according to a survey by Policy Studies Associates, which is evaluating the effort with the RAND Corporation.²

The researchers also found that the districts’ investments in writing or redrafting principal standards have proved to be well worth the effort, as the standards have been “put to work in job descriptions, in the curricula of preparation programs, and, crucially, in assessments and support systems for aspiring and novice principals.”³

The districts have also set up databases that store information about the training, qualifications and performance of all principals and aspiring principals. These “leader tracking systems,” as they have

1 Kenneth Leithwood, Karen Seashore Louis, Stephen Anderson and Kyla Wahlstrom, *How Leadership Influences Student Learning*, Center for Applied Research and Educational Improvement, Ontario Institute for Studies in Education, 2004. Available at www.wallacefoundation.org.

2 Brenda J. Turnbull, Derek L. Riley, Jaclyn R. MacFarlane, *Building a Stronger Principalship, Vol. 3: Districts Taking Charge of the Principal Pipeline*, Policy Studies Associates, 2015, 66. Available at www.wallacefoundation.org.

3 Ibid, 69.



Prospective school leaders receive feedback from peers on their leadership styles during the intensive summer session of the Aspiring Principals Program, a signature effort of the New York City Leadership Academy. (Also see next page).

come to be called, are proving useful in hiring and may have benefits beyond. For example, they have the potential of allowing districts to gather information about principal performance and share it with the university or other training programs from which principals graduate, providing the programs with valuable indicators of their strengths and weaknesses. Still, much remains to be learned about the leader tracking systems and their usefulness.⁴

Another major lesson from the Pipeline work to date regards the importance of assistant principals (APs). The initial initiative design included an effort to nurture people aspiring to become APs, but had ignored those who were already on the job and could remain in the position for up to six years.⁵ The research and further conversations with district leaders suggested that because APs are likely to become principals themselves, a principal pipeline would be incomplete without additional professional development for them. The districts have since added supports for sitting assistant principals.

THE PRINCIPAL SUPERVISOR INITIATIVE

The Pipeline work has brought to light the significance of another post, too. As it stands now in most districts around the country, principal supervisors spend most of their time dealing with bureaucracy in the central office rather than bolstering principals in schools. A Wallace-commissioned study by the Council for the Great City Schools found that principal supervisors are often stretched for time, poorly matched to the needs of their schools and assigned to too many schools.⁶

⁴ Ibid, 52.

⁵ Brenda J. Turnbull, Derek L. Riley, Jaclyn R. MacFarlane, *Building a Stronger Principalship, Vol. 2: Cultivating Talent Through a Principal Pipeline*, Policy Studies Associates, 13. Available at www.wallacefoundation.org.

⁶ Amanda Corcoran, Michael Casserly et al., *Rethinking Leadership: The Changing Role of Principal Supervisors*, Council of the Great City Schools, 2013. Available at www.wallacefoundation.org.

In response, in mid-2014 Wallace launched the Principal Supervisor Initiative, a five-year, \$30-million effort in 14 districts to improve the supervision of principals. Among the 14 are the six pipeline districts as well as two districts—Tulsa and Washington, D.C.—that are considered national leaders in revamping the job and, thus, have lessons that could help other districts undertaking this work.

The main focus of the initiative is on the six remaining districts: Broward County, Fla. (Fort Lauderdale); Cleveland; DeKalb County, Ga. (near Atlanta); Des Moines; Long Beach, Calif.; and Minneapolis. Over the course of the effort, they plan to revise their principal supervisors' job descriptions to focus on assisting principals with instruction; provide better training and support to supervisors; ensure that each supervisor oversees a manageable number of principals; build systems to ensure a steady stream of new supervisors as current supervisors leave; and form plans to reorganize central offices to support supervisors as they support principals. The efforts will be studied in an independent evaluation that will help answer whether and how refocusing the supervisor post leads to more effective principals.

KNOWLEDGE DEVELOPMENT AND DISSEMINATION

Highlights of 2014 included the publication of:

- [The Principal Story Learning Guide](#), an online feature that uses a Wallace-commissioned PBS documentary following two determined principals to illustrate five research-based practices of effective school leaders;
- [New Education Advocacy Organizations in the U.S. States](#), a report and case study examining how advocacy organizations and their funders can influence education policy in the U.S.; and
- [Quality Measures: Partnership Effectiveness Continuum](#), a tool to help guide discussions between school districts and principal training providers interested in forming effective partnerships.⁷

LOOKING AHEAD

Wallace is expecting the publication of more reports in the series evaluating the Principal Pipeline effort. The foundation has also commissioned the Council of the Great City Schools to conduct a survey to learn more about the AP role in urban districts across the U.S. to help determine how assistant principals can be better prepared to become principals. ■



⁷ Learning Forward, *The Principal Story Learning Guide*, Learning Forward, 2014; Paul Manna and Susan Moffitt, *New Education Advocacy Organizations in the U.S. States: National Snapshot and a Case Study of Advance Illinois*, The Wallace Foundation, 2014; C.L. King, *Quality Measures: Partnership Effectiveness Continuum*, Education Development Center, Inc., 2014. These publications are available at www.wallacefoundation.org.

AFTERSCHOOL

Young people can benefit academically, socially and emotionally from high-quality afterschool programs. Historically, however, the afterschool field has been decentralized and disorganized, resulting in a lack of access for children and teens to strong, engaging programs. In response, many cities are developing afterschool systems to coordinate efforts and resources.

Because only high-quality programs get results for children, cities are increasingly making quality improvement a central goal.

In 2003, Wallace began an initiative that eventually included five cities to help them develop afterschool systems. In a study of those cities, the RAND Corporation established a “proof of principle” that the various organizations and institutions involved in afterschool—from schools to nonprofits to government agencies—can work together to coordinate afterschool services. The report also said that this coordination can succeed in increasing access to programs and spur efforts to improve their quality. In 2012, the foundation launched a “next generation” of the initiative to assist nine



cities—Baltimore, Denver, Fort Worth, Grand Rapids, Jacksonville, Louisville, Nashville, Philadelphia and St. Paul—that had already begun to build systems of their own.

As the number of afterschool programs in a city expands and the emphasis on quality increases, the financial management burden on program providers can also grow. Without sound financial management, an organization can find itself in jeopardy when it has to manage bigger, more complex budgets

(Photo from previous page)
Students take part in activities such as art lessons at Nashville's Wright Middle School, one of the participants in the Nashville After Zone Alliance.

and contracts. If enough organizations find themselves facing problems, then the whole system could be compromised. Wallace launched the Strengthening Financial Management initiative in 2009 to help 25 Chicago afterschool providers sharpen the skills they need to get their financial house in order—and to advocate for fairer and more efficient policies and procedures from funders, the Illinois state government in particular.

OVERVIEW OF 2014 - DEVELOPMENTS AND CHALLENGES

AFTERSCHOOL SYSTEM BUILDING

Program providers, city agencies, schools, funders, families and young people all need up-to-date, accurate information to make sound decisions. It takes technology, specifically a management information system (MIS) to track, organize and share data on a large scale. The number of programs in the nine “next generation” cities entering information into an MIS system grew at a noteworthy rate between 2013 and 2014 for two main reasons: 1) more cities adopted a shared MIS; 2) in 2013, cities that had been piloting their MIS with a small number of programs to work out the kinks, rolled out the MIS for as many programs as possible.

DATA COLLECTION EFFORTS		
	Grantee cities with a shared data system	Programs in grantee cities entering data into a shared system
As of October 2013	6 of 9	214
As of October 2014	8 of 9	1,550
% increase	33%	624%

Understanding that only high-quality programs get results for children, cities are increasingly making quality improvement one of the central goals of their afterschool systems and taking steps to assess the quality of their afterschool programs. The number of programs participating in assessments of their quality did not increase nearly as substantially as the number taking part in their city’s MIS, but that is in part because quality assessment is a cyclical process, meaning not all programs participate in any given year. Many of the programs that participated in quality assessment in 2014 did so for the first time.

PROGRAM QUALITY IMPROVEMENT			
	Grantee cities with citywide program quality standards	Grantee cities assessing program quality	Programs in grantee cities assessing program quality
As of October 2013	7 of 9	6 of 9	238
As of October 2014	9 of 9	8 of 9	285
% increase	29%	33%	20%

The cities have also been successful in garnering new resources. Since the start of this initiative, they have secured at least \$2.7 million in additional public and private funding to strengthen and expand their systems (not all cities reported on their fundraising). Despite this progress, financial sustainability remains a challenge. System builders are still learning how to effectively communicate the value of their work.

STRENGTHENING FINANCIAL MANAGEMENT

The Strengthening Financial Management effort provided two types of professional development, each aimed at enhancing the financial management capabilities of the participating afterschool nonprofits. [An evaluation](#) of the initiative, released in early 2015, found that both models—one was more custom-



Student singers in a Nashville After Zone Alliance-affiliated program rehearse for a performance.

Unmet demand for afterschool programming is large; 19.4 million more children would enroll if programs were available.

ized than the other—were effective.¹ Nearly all the nonprofits demonstrated better financial skills, financial data system use, financial reporting, and collaboration between program and financial divisions. Moreover, the organizations that received less expensive group training improved almost as much the ones that received customized coaching, albeit in three years rather than two. The advocacy efforts met with mixed results. The state created a repository that permitted nonprofits to submit standard financial information once a year instead of several times a year. However, the biggest

challenge the nonprofits faced—late payments from the state—was not addressed because of Illinois’ budget crisis.

KNOWLEDGE DEVELOPMENT AND DISSEMINATION

Wallace was one of the funders of the Afterschool Alliance’s latest *America After 3PM* survey, which gathered insights from more than 14,000 parents and guardians nationwide.² Wallace also helped spread news of the findings, specifically that participation in afterschool is on the rise: 18 percent of children in the surveyed households took part in a program in 2014, compared with 15 percent in 2009

¹ Karen Walker, Jean Grossman, Kristine Andrews, Nicholas Carrington and Angela Rojas, *The Skills to Pay the Bills: An Evaluation of an Effort to Help Nonprofits Manage Their Finances*, Child Trends, MDRC, 2015. Available at www.wallacefoundation.org.

² Afterschool Alliance, *America After 3PM: Afterschool Programs in Demand*, Afterschool Alliance, 2014. Available at www.wallacefoundation.org.

and 11 percent in 2004. Still, the unmet demand is large; 19.4 million more children would be enrolled in afterschool if a program were available to them.

StrongNonprofits.org—a clearinghouse for more than 75 free tools, videos and articles, hosted on Wallace’s website—continued to serve as a go-to resource for nonprofits interested in building their financial know-how. The 10 most popular features, on subjects ranging from revenue analysis to budget development, had been downloaded close to 44,000 times between the launch of the site in February 2013 and December 2014.

Students in a Nashville After Zone Alliance-affiliated afterschool program at Wright Middle School get an introduction to budgeting.

LOOKING AHEAD

Technical assistance to Wallace’s afterschool system-building grantees will continue through 2016 and focus in part on helping cities ensure the long-term viability of their systems. This work will inform the development of an array of tools to help cities beyond the initiative with their system-building efforts. The experiences of the nine grantees will also serve as a basis for a report offering useful insights on afterschool systems’ collection and use of data.

StrongNonprofits.org is being periodically refreshed with new materials. ■





It's a high-five moment at a Boston Summer Learning Project-affiliated program offered through the Outward Bound Education Center on Thompson Island in Boston Harbor.

SUMMER AND EXPANDED LEARNING

Over summer vacation, many children forget some of what they learned during the school year. The problem is especially acute, however, for low-income children and contributes to the persistent academic achievement gap between them and higher-income peers. This problem motivated Wallace in 2011 to see whether and how urban school districts with high concentrations of poor children could use voluntary summer programs to boost students' performance in reading and math and thereby help narrow the achievement gap.

Wallace also supports seven leading organizations that provide disadvantaged young people with opportunities for learning and enrichment outside the traditional school day. Three—BELL, Higher Achievement and Horizons National—offer summer learning programs. Two—Citizen Schools and TASC (The After-School Corporation)—offer afterschool services. Communities in Schools is a large drop-out prevention organization that provides schools with services ranging from dental care to clothing distribution. Say Yes to Education coordinates citywide collaborations among government agencies, schools, nonprofits and others in Syracuse, N.Y., and Buffalo to make support services available for all public school children K-to-12, along with the promise of a fully-paid college education for all high school graduates.

OVERVIEW OF 2014 – DEVELOPMENTS AND CHALLENGES

SUMMER LEARNING DISTRICT DEMONSTRATION PROJECT

The Summer Learning District Demonstration is a six-year effort in five school districts—Boston, Dallas, Duval County (Jacksonville, Fla.), Pittsburgh and Rochester—that has two purposes: to provide children with voluntary, district-led summer programs that offer a mix of academic instruction and enrichment, and to test whether these programs help boost student success in school.

RAND is examining the impact on children of their participation in summer learning programs for two consecutive summers.

Wallace commissioned the RAND Corporation to conduct a randomized controlled trial of the effort, examining the impact on children of their participation in the program for two consecutive summers (2013 and 2014), beginning when the students were “rising” fourth graders. The initial

findings, published late in 2014, looked at the effects of one summer of programming in the near term, that is, in the fall 2013, after the children took part in the first summer of programming. In addition to finding that the districts successfully recruited large numbers of low-income students into the summer programs, the researchers determined that:

- The programs had a statistically significant positive effect on students’ math achievement.
- One summer of programming did not make a measurable difference in students’ reading achievement or social-emotional competencies.
- A number of factors—including attendance, instructional time, quality of instruction, behavior, and teacher experience—were related to positive outcomes.

Many of the expanded learning efforts are working to align their programs with the Common Core State Standards.

The second summer of programming for students in the study took place in 2014. Some 12,500 children, the vast majority from low-income households with limited access to summer opportunities, received enhanced summer programming that year. RAND is scheduled to issue findings on the impact of two consecutive summers of programming in 2016.

EXPANDED LEARNING OPPORTUNITIES

All seven of Wallace’s expanded learning grantees serve significantly more children than they did before Wallace support began:

GRANTEE	2009	2010	2013-2014
BELL	3,008		9,376
Higher Achievement	594		1,045
Horizons	1,689		3,301
Citizen Schools		1,441	4,055
TASC		382	3,818
Communities in Schools*		1,255,947	1,469,266
Say Yes to Education*		2,300	59,064

*The reach of Communities in Schools far exceeds other programs’ because the organization provides services to all children in CIS’s nationwide network of schools. Say Yes has set out to reach all children in the two school districts where it operates, Syracuse and Buffalo.

The organizations have taken steps to address the challenge of balancing this expansion with the goal of maintaining and improving program quality. Some are developing performance evaluations of staff



Aspiring fencers learn the basics of swordsmanship at the Pittsburgh Summer Dreamers Academy camp.



In addition to academics, enrichments including art and sports are on the menu at a BELL summer learning program in Boston.

LOOKING AHEAD

Wallace has decided to continue its partnership with the five districts participating in its summer learning demonstration through 2016 so they will be able to provide summer learning opportunities to more children, continue to benefit from technical assistance and peer learning, and inform the development of useful knowledge and tools for educators and policymakers. ■

members who work with children. Most are working to align their programs with the Common Core State Standards, in some cases by introducing new teaching methods, which has led to a restructuring and expansion of staff training.

KNOWLEDGE DEVELOPMENT AND DISSEMINATION

RAND's first report on impacts of the Summer Learning District Demonstration Project, *Ready for Fall?*, was the subject of thoughtful media coverage and related social media activity nationally and in the participating districts.

The year 2014 also saw the release of *Scaling Up, Staying True*.¹ The report covers a 2013 gathering where Wallace's expanded learning grantees, researchers, experts in nonprofit strategy, communications professionals and foundation staff members wrestled with a pressing question for the field: How can national nonprofits provide expanded learning opportunities to as many children as possible while maintaining program quality and financial stability?

¹ Jennifer Sloan McCombs, John F. Pane, Catherine H. Augustine, Heather L. Schwartz, Paco Martorell, Laura Zakaras, *Ready for Fall? Near-Term Effects of Voluntary Summer Learning Programs on Low-Income Students' Learning Opportunities and Outcomes*, RAND Corporation, 2014; Daniel Browne, *Scaling Up, Staying True: A Wallace Conference Report on Spreading Innovations in Expanded Learning*, The Wallace Foundation, 2014. Both publications are available at www.wallacefoundation.org.



*Digital visual
arts director
Alex Zacarias
works with
young artists at
the Boys & Girls
Club of Greater
Green Bay.*

ARTS EDUCATION

Since 2005, Wallace has been working to help overcome a decline in public school arts education that began in the late 1970s by finding ways to engage more young people in high-quality arts learning during the school day and beyond. Our Arts for Young People initiative has two goals. The first is to improve access to high-quality arts education so more young people can benefit from it. The second is to promote a more equitable distribution of that education so that children who live in disadvantaged communities with few arts institutions and little school-based arts instruction can benefit.

Our initiative targeted at public schools—which over the years has supported planning for stronger and expanded arts instruction in a number of school districts as well as implementation of plans in Dallas and Boston—is winding down. Much of our focus today is on working with the Boys & Girls Clubs of America (BGCA), a national, federated, youth-serving organization, to provide arts programming for middle-school-aged children beyond the school day. BGCA serves more than 4.2 million children and teens—many from disadvantaged communities—every year through 4,300 clubhouses. Wallace is helping BGCA to carry out an effort to develop high-quality arts programs in several of its clubhouses. It is also studying BGCA’s efforts to determine ways in which it could expand the work to reach many more young people across the country. This knowledge, we hope, will help other youth-serving organizations with multiple sites understand how to develop and carry out high-quality arts programs for youth.

OVERVIEW OF 2014 – DEVELOPMENTS AND CHALLENGES

BGCA is basing its work on 10 principles for successful arts programs laid out in *Something to Say*, a 2013 Wallace-commissioned study of such programs that draws on research in youth development and arts education as well as hundreds of interviews with young people, their families, leaders of exemplary

New arts offerings in participating clubhouses range from dance and graphic design to photography and digital music.

programs and others nationwide.¹ The initiative seeks to answer the question of how a national youth organization can increase and sustain the engagement of urban tweens in high-quality arts programs.

In 2014, BGCA began placing year-round arts programs in six clubhouses, two each in Milwaukee and Green Bay, Wis., and two in St. Cloud in neighboring Minnesota. The work started with these clubhouses because of their readiness to participate in the initiative and, to facilitate learning among the clubhouses, their proximity to each other.

Young artists in the “Music Makers” program at the Boys & Girls Club of Greater Green Bay study old school hip-hop technics.



Each clubhouse is offering learning opportunities in two arts disciplines, including dance, visual arts, graphic design, photography, digital music and fashion design. The core of the new programs consists of six-week sessions offered four times over the academic year. Clubhouses are also offering shorter sessions over the summer designed to engender interest for the more substantive programs during the school year. In addition, weekly, three-hour “open studio” programs give any club member the opportunity to discover and explore a new art form without enrolling in the formal programs.

Clubhouses have incorporated into these programs many of the principles outlined in *Something to Say*. For example, all six have set up well-equipped, “dedicated” spaces for the arts program. Each has hired a teaching artist with the skills and experience necessary to provide instruction in each art form. In addition, young people have had opportunities to participate in the interview and selection of the teachers, a key concept in youth development.

An independent research team is studying the efforts to help clubhouses improve on arts programming—and to generate insights that could help place similar programs in other clubhouses. The researchers’ observations have already led clubhouses to make a number of changes, including inviting greater youth input into the design of their programs, raising the level of commitment and achievement they expect from their participants, and creating more engaging visuals for the clubhouse, such as murals and posters.

The effort has not been without its challenges. Clubhouses have found they need to work, for example, to build cohesion among the staff when introducing arts-education specialists into an environment of generalists. They are also finding that injecting all the elements of high-quality arts programming into their offerings takes time.

LOOKING AHEAD

The clubhouses that started Wallace-funded work in 2014 are expected to continue their efforts. Based on the experiences of the first years of the initiative, BGCA plans to introduce new art programming in clubhouses in several additional cities in 2017 and 2018. Wallace-funded researchers will continue to study the work and are expected to publish reports—all of which will be publicly available—in coming years. ■

¹ Denise Montgomery, Peter Rogovin and Nero Persaud, *Something to Say: Success Principles for Afterschool Arts Programs From Urban Youth and Other Experts*, The Wallace Foundation, 2013. Available at www.wallacefoundation.org.



Philadelphia's Clay Studio, a studio, gallery and shop, has engaged in a number of efforts to interest younger people in the ceramic arts.

AUDIENCE DEVELOPMENT FOR THE ARTS

The arts bestow great benefits on those who participate in them, from the captivation that individuals experience in the presence of a work that resonates with them to the social bonds forged when communities encounter art that strikes a common chord. And yet, the estimated number of Americans participating in art forms tracked over the years by the National Endowment for the Arts has fallen from 41

percent in 1992 to 33 percent in 2012.¹ As demand falls, so do ticket sales and revenues for arts organizations, creating concerns about the organizations' sustainability.

Lessons from Wallace's past efforts have laid the foundations for a major new initiative: Building Audiences for Sustainability.

The Wallace Foundation has long invested in efforts to reverse these trends and ensure the vitality of the arts for everyone. In recent years, our support for the arts focused largely on the Wal-

lace Excellence Awards (WEA), multi-year grants that supported audience-building projects in 54 visual and performing arts organizations in six cities around the country. These projects sought to broaden audiences (i.e., attract new people who are inclined to enjoy an art form but do not attend performances or exhibitions), deepen them (i.e., have current audience members attend more often) or diversify them (i.e., engage new groups).

¹ National Endowment for the Arts. *A Decade of Arts Engagement: Findings From the Survey of Public Participation in the Arts, 2002–2012*, p. 3. Available online at <http://arts.gov/sites/default/files/2012-sppa-jan2015-rev.pdf>.

Results were promising. Across the 46 WEA recipients that provided reliable data, organizations seeking an increase in the size of their overall audience saw median gains of 27 percent, while those aiming for growth in a specific segment of the population saw median gains of 60 percent in that target group. An analysis of the efforts of 10 of the grant recipients also pointed to a set of nine practices other organizations could adopt to increase their chances of success.

The WEA effort has now ended, but the lessons learned from it have laid the foundations for a major new initiative: Building Audiences for Sustainability.

OVERVIEW OF 2014 - DEVELOPMENTS AND CHALLENGES

The six-year, \$52-million effort seeks to help 26 performing arts organizations create programs that attract new audiences while retaining existing ones, measuring whether and how this contributes to their overall financial health. The hope is to assist the grantee organizations in carrying out this challenging work and develop practical insights that arts organizations in general can use to successfully expand their audiences.

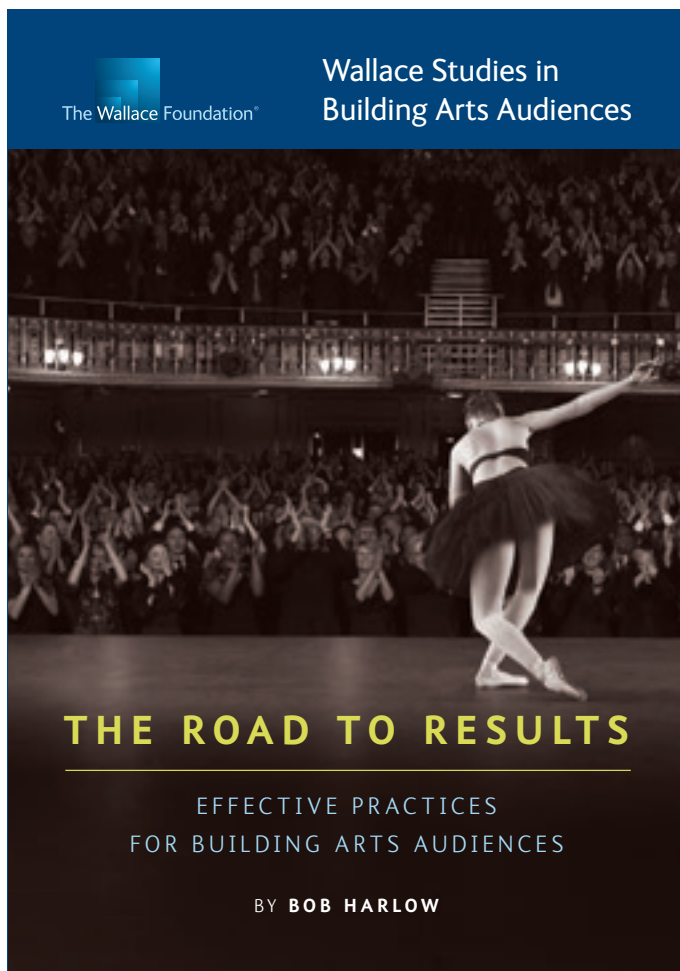
The participant pool, selected in early 2015, comprises dance, orchestra, opera, theater and multidisciplinary arts organizations from across the continental U.S. The targets of their proposed audience-building projects include racial and ethnic groups, age-cohorts (primarily millennials), and people working in specific sectors (such as technology). Their strategies include commissioning new art works, involving target audience members in the creation and/or selection of works to be performed, and staging works in churches, black-box theaters or other venues outside the main performance hall.

The initiative is structured around what Wallace refers to as “learning cycles.” Each grantee is to design an audience-building project informed by research, carry out the project, assess the results and then use what it has learned to shape a new cycle.

Wallace-commissioned researchers will study the organizations’ efforts throughout the initiative to help understand whether and how they can achieve and sustain audience gains, and whether these gains improve their financial health.

Wallace Foundation President Will Miller announced Wallace’s new initiative in the arts at an event featuring a panel discussion by arts leaders on audience building for the arts.





KNOWLEDGE DEVELOPMENT AND DISSEMINATION

In 2014, Wallace published *The Road to Results*, by audience-research expert Bob Harlow, which describes nine practices arts organizations can consider adopting in efforts to build their audiences. In addition, Wallace published another in its series of case studies examining the work of the arts organizations that *Road to Results* draws from; *Someone Who Speaks Their Language* offers a detailed view into the ways in which the Minnesota Opera, a WEA recipient, tapped into the audience of a local radio host to attract women ages 35 to 60. Wallace also published *Thriving Arts Organizations, Thriving Arts*.² This update summarizes key findings from the work of WEA recipients and, drawing on previously published and new data, concludes that building audiences is a top challenge for arts leaders, in part because of heightened competition for leisure time, a national slump in arts participation rates and declines in arts education.

LOOKING AHEAD

Wallace plans to work closely with the grant recipients for the new Building Audiences for Sustainability initiative. In particular, we will support recipients as they define target audiences, conduct research to determine audience preferences and develop plans for the first phases of initiative work. Wallace-commissioned researchers will also study their efforts and collect data that we hope will help refine strategies for future phases of work. We also plan to release additional, detailed case studies from the WEA initiative, in the hope that the publications provide ideas for our grant recipients and others working to bring the benefits of the arts to their communities. ■

Published in 2014, *The Road to Results* describes nine practices arts organizations can consider adopting in efforts to build their audiences.

² Bob Harlow, *The Road to Results: Effective Practices for Building Arts Audiences*, Bob Harlow Research and Consulting, LLC, 2014; Bob Harlow and Cindy Cox Roman, *Someone Who Speaks Their Language: How a Nontraditional Partner Brought New Audiences to Minnesota Opera*, Bob Harlow Research and Consulting, LLC, 2014; Pamela Mendels, *Thriving Arts Organizations, Thriving Arts: What We Know About Building Audiences for the Arts and What We Still Have to Learn*, The Wallace Foundation, 2014. All these publications are available at www.wallacefoundation.org.

Public Outreach

We strive to help both the organizations that we fund and, through the knowledge we develop and share, those that do not receive our financial support. Our grantees learn important lessons in the course of their work, so we invest in significant public outreach efforts to make those lessons available to others. Our hope is that the ideas and information we disseminate will benefit people working to improve policy and practices in education, the arts, afterschool, and summer and expanded learning.

PUBLICATIONS AND PRODUCTS

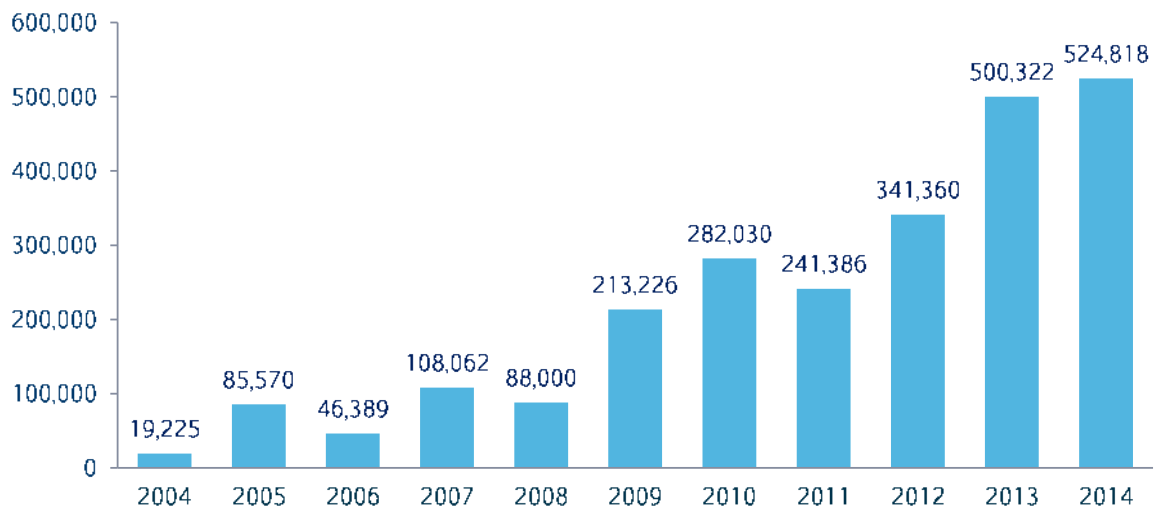
In 2014, we issued dozens of reports, videos and other knowledge products that chronicle the experiences of our grantees and offer ideas for others working in their fields. A sampling of these products includes:

- In-depth reports such as [Ready for Fall?](#), one in a series of RAND reports examining the implementation and impact of high-quality school district-led summer learning programs;
- Resources such as [Quality Measures: Partnership Effectiveness Continuum](#), a tool to help guide discussions between school districts and principal training providers interested in forming effective partnerships;
- Video series including [Something to Say: Five Experts Lay Out Ideas for High-Quality Afterschool Arts Programs](#), in which scholars, researchers and leaders of afterschool arts programs make the case for high-quality arts instruction; and
- Presentations and infographics that condense dense research publications into simple, concise, digestible formats.

ON THE WEB

Our website, our main avenue for public outreach, attracted more than 990,000 visits in 2014. The steady growth in downloads of our knowledge products continues; total downloads reached nearly 525,000 in 2014.

**DOWNLOADS FROM THE WALLACE FOUNDATION WEBSITE
2004-2014**



Downloads increased across all our areas, with the greatest number of reports downloaded from the portion of our website devoted to education leadership, the biggest sector in our fields of work. Education leadership is also the area where we have developed the largest store of knowledge and where we have come to be seen as a “go-to” place for information. [How Leadership Influences Student Learning](#), a landmark 2004 study that finds that school leadership is second only to teaching among school influences on student success, continues to be the most popular publication on our website. It was downloaded more than 80,000 times in 2014.

TOPIC AREA	DOWNLOADS
Education leadership	259,000
Learning and enrichment	111,000
Arts	65,000
Other	90,000
TOTAL	525,000

The charts on the following pages list the top five downloaded resources in 2014 in each of our three broad topic areas and the specific contribution they make to field knowledge.

TOP DOWNLOADS FOR EDUCATION LEADERSHIP

	SOURCE	CONTRIBUTION TO FIELD LEARNING	DOWNLOADS IN 2014	DOWNLOADS SINCE RELEASE (THROUGH 12/31/14)
<i>How Leadership Influences Student Learning (2004)</i>	Universities of Minnesota and Toronto	Documents leadership is second only to teaching among school-related factors in student success.	80,845	342,040
<i>The School Principal as Leader: Guiding Schools to Better Teaching and Learning (2012)</i>	Wallace	A Wallace Perspective identifies five practices principals should consider to maximize their positive impact on teaching and learning.	51,239	141,776
<i>Learning from Leadership: Investigating the Links to Improved Student Learning (2010)</i>	Universities of Minnesota and Toronto	Largest education leadership study to date confirms that effective school leadership is linked to student achievement	16,042	51,147
<i>The Making of the Principal: Five Lessons in Leadership Training (2012)</i>	Wallace	A Wallace Perspective’s evidence and recommendations include: more selective admission to principal training programs, a focus on instructional leadership and mentoring for new principals.	15,285	34,421
<i>Preparing School Leaders for a Changing World: Lessons from Exemplary Programs (2007)</i>	Stanford University	Documents common elements among eight effective principal training programs, concluding “high-performing principals are not just born but can be made”	12,048	37,410

TOP DOWNLOADS FOR LEARNING AND ENRICHMENT

	SOURCE	CONTRIBUTION TO FIELD LEARNING	DOWNLOADS IN 2014	DOWNLOADS SINCE RELEASE (THROUGH 12/31/14)
<i>Program-Based Budget Builder (2013)</i>	FMA	A detailed EXCEL spreadsheet budget template designed to help non-profits develop accurate budgets	11,371	16,328
<i>A Place to Grow and Learn: A Citywide Approach to Building and Sustaining Out-of-School-Time Learning Opportunities (2008)</i>	Wallace	A Wallace Perspective identifies six steps to creating citywide systems to support high-quality afterschool. Steps include: careful planning; obtaining mayoral backing; program quality standards; and systems to collect reliable data.	10,162	122,321
<i>A Five-Step Guide to Budget Development (2013)</i>	FMA	A PowerPoint presentation to help guide the use of the <i>Program-Based Budget Builder</i>	8,940	13,334
<i>Making Summer Count: How Summer Programs Can Boost Children's Development (2011)</i>	RAND	Research synthesis finds that learning loss during the summer disproportionately affects low-income children and offers evidence that programs can help	6,563	17,787
<i>Hours of Opportunity: Lessons from Five Cities on Building Systems to Improve After-School, Summer, and Other Out-of-School Time Programs, Volume I (2010)</i>	RAND	Finds a "proof of principle" that city-wide systems can strengthen access to high-quality afterschool	5,619	17,839

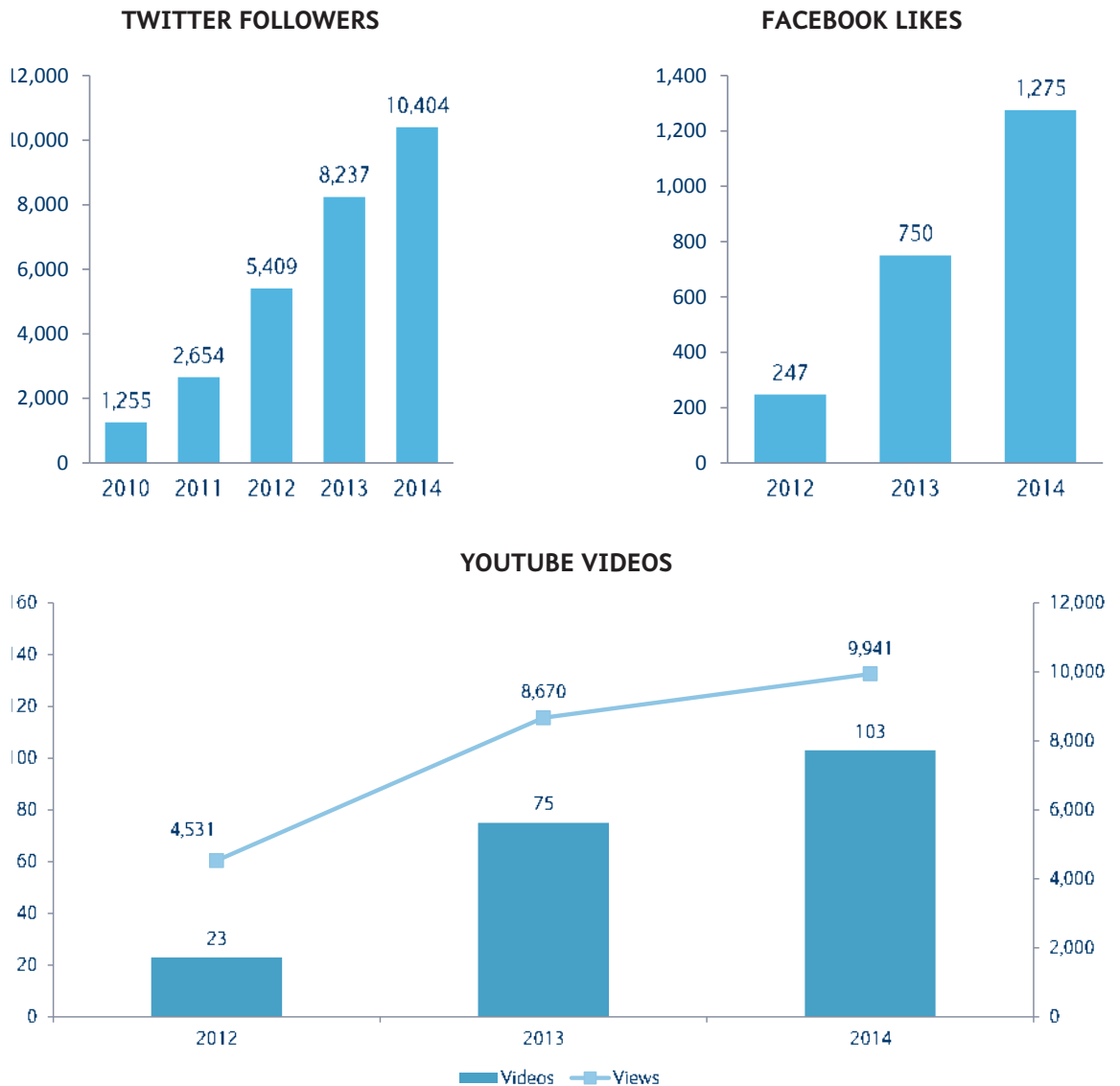
TOP DOWNLOADS FOR ARTS

	SOURCE	CONTRIBUTION TO FIELD LEARNING	DOWNLOADS IN 2014	DOWNLOADS SINCE RELEASE (THROUGH 12/31/14)
<i>The Road to Results: Effective Practices for Building Arts Audiences (2014)</i>	Wallace	Based on detailed case studies of 10 arts organizations, this study identifies nine practices organizations can follow to engage audiences and align the organizations around the effort.	6,007	6,007
<i>Something to Say: Success Principles for Afterschool Arts Programs From Urban Youth and Other Experts (2013)</i>	Wallace	Using research among 200 youth and parents, 22 expert interviews and observations of 8 exemplary programs, this report distills 10 key factors underlying successful youth arts programs.	5,894	10,297

<i>New Opportunities for Interest-Driven Arts Learning in a Digital Age (2013)</i>	University of Indiana	Describes how digital technologies are offering young people new ways to engage in the arts on their own time and according to their own interests	3,905	11,654
<i>The Road to Results Infographic (2014)</i>	Wallace	Visual depiction of the nine principles for successful audience-building identified in <i>The Road to Results</i>	3,658	3,658
<i>Building Deeper Relationships: How Steppenwolf Theatre Company Is Turning Single-Ticket Buyers Into Repeat Visitors (2011)</i>	Wallace	Part of a series of 10 in-depth case study evaluations, report describes how a noted Chicago theater boosted single ticket purchases by deepening audience engagement	2,145	7,603

SOCIAL MEDIA

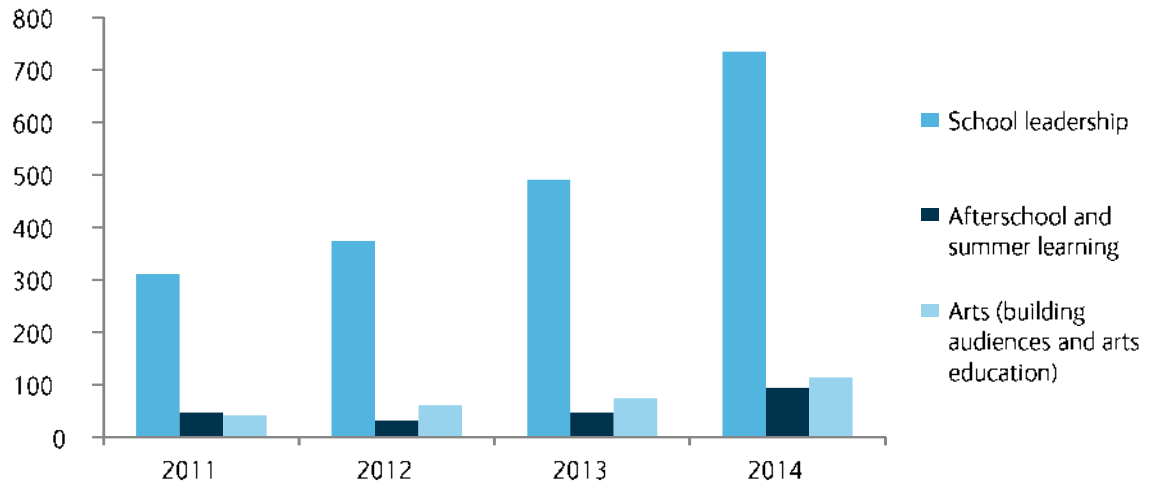
We hit a few important landmarks in our social media efforts in 2014. We secured our 10,000th follower on [Twitter](#), recorded our 1,000th “like” on [Facebook](#) and added our 100th video to [YouTube](#). Our videos were viewed nearly 1,000 times in 2014, a 15 percent increase over 2013.



CITATIONS

Citations of our reports by scholars, think tanks and other foundations are a sign that these materials are regarded as credible and useful. Citations increased by 21 percent over 2013 and have steadily grown since 2011. The total number of citations since we began measurement in 2007 was 5,509 by the end of 2014. Reflecting the greater prevalence of research on public education and the greater attention given to it in policy, education leadership received more citations of research than our other areas.

ANNUAL GROWTH IN CITATIONS BY TOPIC AREA



Source: Google Scholar

MEDIA APPEARANCES AND NOTABLE MENTIONS

Several Wallace efforts received media attention in 2014. The launch of our new initiative in the arts was perhaps the most prominent. Wallace announced the initiative with a major event in New York City in October. The event was hosted by WNYC, the city’s public radio affiliate, and featured Jane Chu, chairman of the National Endowment for the Arts; novelist and radio host Kurt Andersen; and leaders of arts organizations from Chicago, Seattle and New York City. National news outlets covered the announcement, including [The New York Times](#), [The Washington Post](#), [The Los Angeles Times](#), [The Wall Street Journal](#) and local papers in communities in which Wallace will invest.

Ready for Fall?, which looks at the near-term effects on students of their participation in one summer of programming conducted through Wallace’s summer learning effort in five school districts, also received significant attention. It was the subject of reports in specialized publications including [Education Week](#) and [Youth Today](#). It also received coverage in major daily newspapers, including those in [Dallas](#), [Pittsburgh](#) and [Rochester, N.Y.](#), three of the districts featured in the report. In addition, the report generated activity on social media, including [a mention on Twitter](#) by U.S. Secretary of Education Arne Duncan.



It was the subject of reports in specialized publications including [Education Week](#) and [Youth Today](#). It also received coverage in major daily newspapers, including those in [Dallas](#), [Pittsburgh](#) and [Rochester, N.Y.](#), three of the districts featured in the report. In addition, the report generated activity on social media, including [a mention on Twitter](#) by U.S. Secretary of Education Arne Duncan.

The launch of Wallace’s Principal Supervisor Initiative also attracted attention in specialized and general news outlets including [The Washington Post](#) and [The Atlanta Journal-Constitution](#).

LOOKING AHEAD

Wallace will continue to work with grantees to generate new insights and disseminate them as widely as possible. For 2015, we were planning to engage in outreach activities to publicize a number of major new reports, including an exploration of considerations for state policymakers who want to bolster the work of school principals and an examination of the non-academic factors that can help children succeed. We will also continue to experiment with new ways to present the lessons we learn so they are easier to digest and share, especially on social media. ■

HOW GRANTEES VIEW WALLACE

Every other year, we ask the Center for Effective Philanthropy (CEP) to conduct an anonymous survey of our grantees rating The Wallace Foundation on a variety of factors. This survey is particularly useful because the answers are anonymous and benchmarked against CEP’s database of ratings of more than 300 foundations by more than 40,000 grantees over 13 years. The results are also compared with results from a list of “peer foundations,” foundations that are similar to Wallace in size, approach and focus. This was our seventh survey since 2004, giving us trend data over time that make the results more meaningful.

We looked at questions addressing Wallace’s reputation in terms of our three-part approach to philanthropy: 1) understanding the context, 2) generating improvements and insights, and 3) catalyzing broad impact. The rating of our understanding of the fields in which we work is a statistically significant increase from 2012.

PERCENTILE	WALLACE 2014	WALLACE 2012	PEERS 2014
“How well does the foundation understand the field in which you work?”	98 th	79 th	80 th

There are no questions in the survey directly addressing the topic of generating improvements and insights, so we look at ratings of the impact on our grantees’ organizations and their fields.

PERCENTILE	WALLACE 2014	WALLACE 2012	PEERS 2014
“How would you rate the foundation’s impact on your organization?”	41 st	44 th	53 rd
“How much, if at all, did the foundation improve your ability to sustain the work funded by the grant in the future?”	26 th	45 th	55 th
“To what extent has the foundation advanced the state of knowledge in your field?”	100 th	97 th	90 th

The 100th percentile rating on advancing field knowledge is the highest in the 13-year history of the database.

The low ratings on organization impact and sustainability may reflect Wallace’s tight focus on a specific aspect of an organization’s work vs. the full breadth of the organization’s activity, as well as difficulty organizations may encounter in finding ongoing replacement funds for Wallace grants, which are larger and longer term than the grants from many foundations.

The 100th percentile rating on advancing the state of knowledge in the field is the highest in the 13-year history of the database. Because advancing knowledge is a central objective of our strategy and is the basis for our efforts to catalyze broad impact, we were pleased to see this result.

The survey indicates that we are seen as being as influential on policy as our peer foundations and more influential on practice.

We aim to contribute to change on a broad scale by influencing both public policy and field practice. The survey indicates that we are seen as being as influential on policy as our peer foundations and more influential on practice.

PERCENTILE	WALLACE 2014	WALLACE 2012	PEERS 2014
"To what extent has the foundation affected public policy in your field?"	81 st	78 th	81 st
"Overall, how would you rate the foundation's impact on your field?"	82 nd	71 st	63 rd

Because we can accomplish our work only in partnership with others, it's vital that we maintain strong, trust-based relationships—overcoming what can be a built-in power imbalance between foundations and grantees. Compared with 300-plus foundations in CEP's database, Wallace shows strength in responsiveness and clarity. We are in the middle in approachability, and have work to do on fairness and consistency of communications. We have improved since 2012 on all indicators except consistency of communications on goals and strategy.

PERCENTILE	WALLACE 2014	WALLACE 2012	PEERS 2014	DIRECTION
Fairness	40 th	27 th	55 th	↑
Approachability	49 th	35 th	50 th	↑
Responsiveness	68 th	38 th	60 th	↑↑
Clarity	57 th	50 th	57 th	↑
Consistency of communications	38 th	37 th	22 nd	—

CEP added questions about transparency for the first time this year. Compared with the 41 foundations rated, Wallace ranks highly: in the 99th percentile for best sharing practices learned through our work, the 90th percentile for transparency about what has not worked in past grant-making and the 67th percentile for overall transparency.

LOOKING AHEAD

To address the relatively low rating on organization impact, we are looking for ways to help grantees link their Wallace-funded work with broader, organization-wide priorities. We will make the sustainability of grant-funded work a point of emphasis in all our future initiatives.

By reinforcing our role as a source of credible, useful knowledge, we plan to continue our efforts to advance the on-the-ground work in our fields of interest. At the same time, we plan to become more intentional and systematic in ensuring that policymakers can take advantage of the ideas and information that Wallace generates. ■

NEW PUBLICATIONS AND MULTIMEDIA RESOURCES FROM WALLACE

Downloadable for free at www.wallacefoundation.org

AFTERSCHOOL

PUBLICATIONS

DIFFERENCES A DAY CAN MAKE: EXPLORING THE EFFECTS OF AN ABBREVIATED INTERVENTION ON IMPROVING FINANCIAL MANAGEMENT FOR YOUTH-SERVING ORGANIZATIONS

This report examines the effectiveness of a one-day workshop and series of webinars offered to afterschool nonprofits to strengthen their financial management.

AMERICA AFTER 3PM: AFTERSCHOOL PROGRAMS IN DEMAND

A survey of close to 14,000 parents and guardians nationwide finds a jump in participation in afterschool in the U.S. over the last decade.

GRANTMAKERS AND THOUGHT LEADERS ON OUT-OF-SCHOOL TIME: SURVEY & INTERVIEW REPORT

This report takes a look at the priorities of grantmakers that support afterschool or other expanded learning efforts.

BUILDING AUDIENCES FOR THE ARTS

PUBLICATIONS

THE ROAD TO RESULTS: EFFECTIVE PRACTICES FOR BUILDING ARTS AUDIENCES

This guide for arts organizations pinpoints nine practices that successful audience-building projects had in common.

THRIVING ARTS ORGANIZATIONS, THRIVING ARTS: WHAT WE KNOW ABOUT BUILDING AUDIENCES FOR THE ARTS AND WHAT WE STILL HAVE TO LEARN

This Wallace Arts Update summarizes key findings from Wallace's work supporting audience-building efforts by arts organizations and related studies.

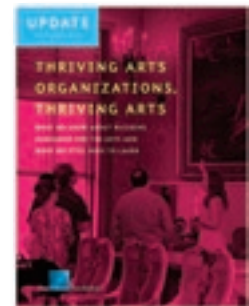
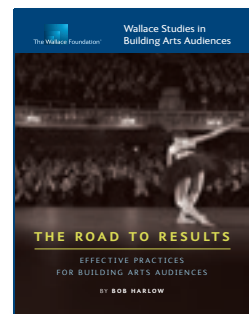
NEW MEDIA

VIDEO: NEA CHAIRMAN JANE CHU ON THE VALUE OF THE ARTS

In preparation for a Wallace Foundation panel discussion on building audiences for the arts, National Endowment for the Arts Chairman Jane Chu spoke about how the arts can enrich people's lives.

VIDEO: ARTS LEADERS SHARE IDEAS FOR BUILDING AUDIENCES

A panel of arts leaders joined radio host Kurt Andersen and NEA Chairman Jane Chu to explore how arts organizations can attract new audiences while remaining true to their visions and longtime supporters.



SCHOOL LEADERSHIP

PUBLICATIONS

QUALITY MEASURES: PARTNERSHIP EFFECTIVENESS CONTINUUM

This tool can be used to gauge partnerships between school districts and principal training providers in areas such as the quality of their communications and collaboration.

NEW EDUCATION ADVOCACY ORGANIZATIONS IN THE U.S. STATES: NATIONAL SNAPSHOT AND A CASE STUDY OF ADVANCE ILLINOIS

This report examines the emergence of a new kind of education advocacy organization in the U.S., assesses how these organizations are influencing education policy and offers a case study of one of them, Advance Illinois.

NEW MEDIA

WEBSITE: THE PRINCIPAL STORY LEARNING GUIDE

This website uses a PBS documentary (commissioned by Wallace) to illustrate five practices that can help school leaders succeed.

SUMMER AND EXPANDED LEARNING OPPORTUNITIES

PUBLICATIONS

READY FOR FALL? NEAR-TERM EFFECTS OF VOLUNTARY SUMMER LEARNING PROGRAMS ON LOW-INCOME STUDENTS' LEARNING OPPORTUNITIES AND OUTCOMES

This report presents the first set of student outcome findings from Wallace's six-year National Summer Learning Project.

INSTITUTIONALIZING EXPANDED SCHOOLS: EVALUATION FINDINGS FROM THE SECOND YEAR OF TASC'S NATIONAL DEMONSTRATION

This report discusses findings from year two of a five-year evaluation of an effort in three cities to extend the school day with high-quality learning and enrichment.

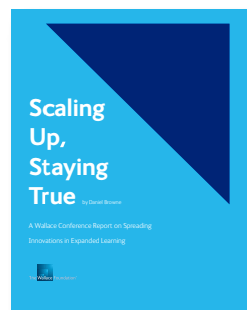
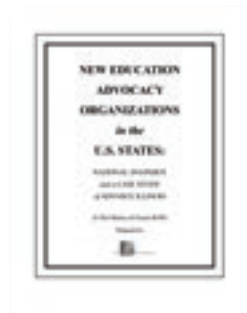
SCALING UP, STAYING TRUE: A WALLACE CONFERENCE REPORT ON SPREADING INNOVATIONS IN EXPANDED LEARNING

This report covers a gathering at which Wallace grantees, researchers and others discussed how expanded learning nonprofits can expand their efforts while maintaining program quality and financial stability.

NEW MEDIA

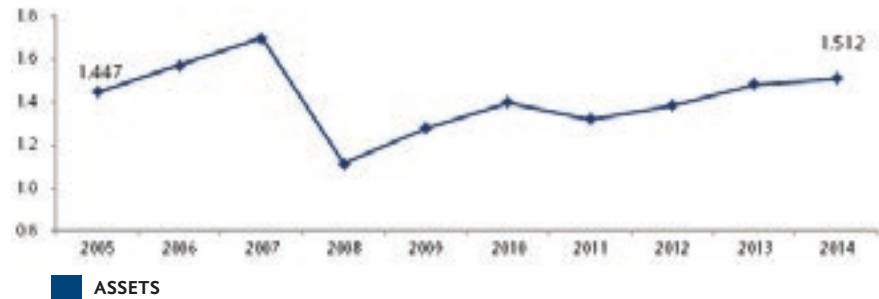
VIDEO: THE NATIONAL SUMMER LEARNING PROJECT

This video describes Wallace's National Summer Learning Project, including near-term research findings about the impact of participating programs.



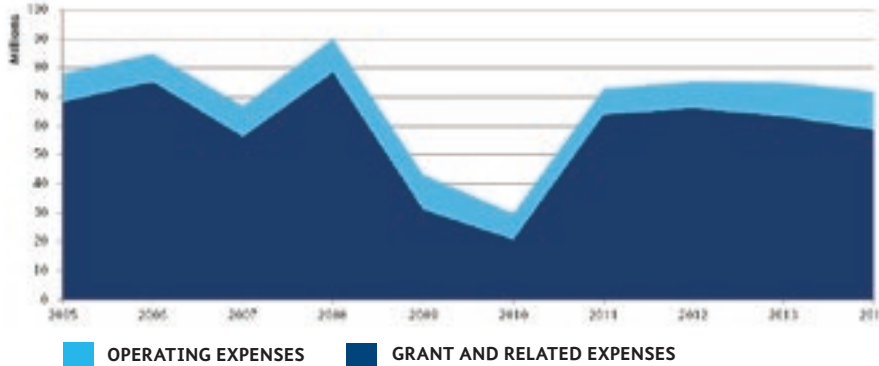
FINANCIAL OVERVIEW

INVESTMENT ASSETS



Our portfolio totaled \$1.512 billion on December 31, 2014, which was \$29 million higher than December 31, 2013. Over the last 10 years we paid \$695 million in grants and expenses, which included \$80 million in operating and grant/program expenses paid in 2014.

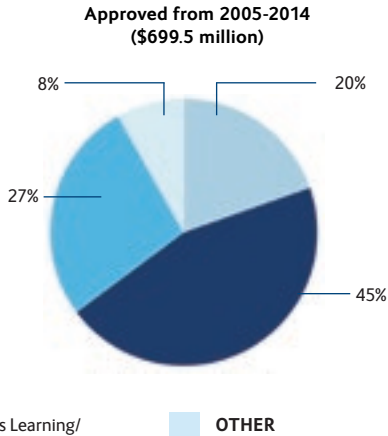
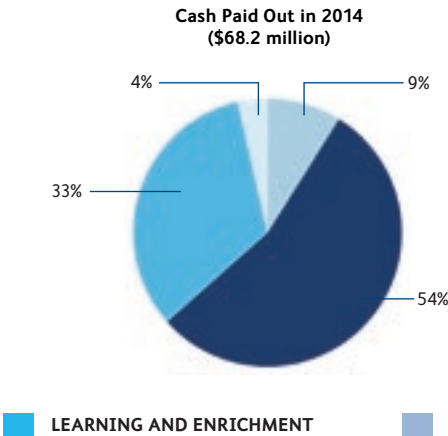
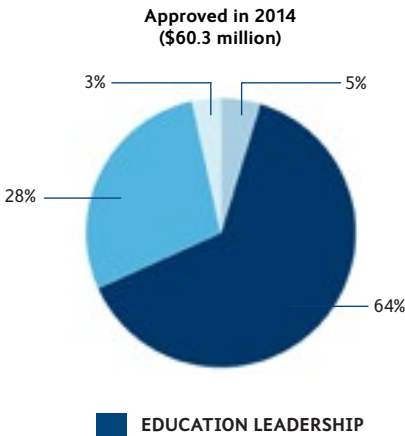
WALLACE'S EXPENSES OVER A DECADE



The bulk of grants and related expenses goes to education, arts, social service and other nonprofit organizations. Also included is spending for research and communications.

GRANT/PROGRAM EXPENSES BY FOCUS AREA

The pie charts below show spending in Wallace's areas of interest. The first shows program grants and expenses approved in 2014. The second shows grants/expenses paid in 2014, including grants approved in earlier years. The third shows the total grant amounts approved since 2005.



PROGRAM EXPENDITURES AND COMMITMENTS

The following tables describe and list the expenditures made in 2014 to advance Wallace’s work in its areas of afterschool, arts education, audience development for the arts, school leadership, and summer and expanded learning. In most of these areas, our approach and expenditures are grouped largely 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 fields of interest. We then use a number of different communications strategies to get the word out.



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

PRINCIPAL PIPELINE INITIATIVE

1. DEVELOP INNOVATION SITES

These grants and contracts support Wallace’s Principal Pipeline Initiative, which is working with selected school districts to improve training and support of principals and then evaluate the results for students.

Organization / IRS name, if different (City, State)	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
CHARLOTTE-MECKLENBURG BOARD OF EDUCATION (Charlotte, N.C.) — To enable the Charlotte-Mecklenburg school district to take part in the pipeline effort.	\$2,200,000	\$2,200,000	–	\$2,200,000	–
DENVER PUBLIC SCHOOLS FOUNDATION (Denver, Colo.) — To enable the Denver school district to take part in the pipeline effort.	\$4,000,000	\$4,000,000	–	\$4,000,000	–
EDUCATION DEVELOPMENT CENTER, INC. (Waltham, Mass.) — To help assess the quality of principal training programs in Georgia.	\$150,000	\$150,000	–	\$150,000	–
EDUCATION DEVELOPMENT CENTER, INC. (Waltham, Mass.) — To manage a professional learning community of principal training programs and their alumni.	\$450,000	\$450,000	–	\$450,000	–
THE FUND FOR PUBLIC SCHOOLS, INC. (New York, N.Y.) — To enable the New York City school district to take part in the pipeline effort.	\$3,200,000	\$3,200,000	–	\$3,200,000	–
GWINNETT COUNTY BOARD OF EDUCATION (Suwanee, Ga.) — To enable the Gwinnett County school district to take part in the pipeline effort.	\$3,100,000	\$3,100,000	–	\$3,100,000	–
NATIONAL ASSOCIATION OF SECONDARY SCHOOL PRINCIPALS (Reston, Va.) — To manage a professional learning community for pipeline district principals.	\$250,000	\$250,000	–	\$250,000	–

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
THE NYC LEADERSHIP ACADEMY, INC. (Long Island City, N.Y.) — To manage a professional learning community for the districts in the Principal Pipeline Initiative.	\$750,000	\$750,000	—	\$750,000	—
PRINCE GEORGE'S COUNTY BOARD OF EDUCATION (Upper Marlboro, Md.) — To enable the Prince George's County school district to take part in the pipeline effort.	\$3,700,000	\$3,700,000	—	\$3,700,000	—
THE SCHOOL BOARD OF HILLSBOROUGH COUNTY, FLORIDA (Tampa, Fla.) — To enable the Hillsborough County school district to take part in the pipeline effort.	\$3,900,000	\$3,900,000	—	\$3,900,000	—
OTHER RELATED EXPENSES — Activities including management of the Pipeline initiative and development of school district data systems on principals' training and careers.	\$476,268	\$186,185	\$179,659	\$149,584	\$147,025

2. DEVELOP AND SHARE KNOWLEDGE

AMERICAN ASSOCIATION OF SCHOOL ADMINISTRATORS (Alexandria, Va.) — To disseminate knowledge about school leadership through webinars, publications and the organization's national conference.	\$210,000	\$210,000	—	\$210,000	—
AMERICAN INSTITUTES FOR RESEARCH IN THE BEHAVIORAL SCIENCES (Washington, D.C.) — To create and maintain an online, interactive map of state school leadership standards	\$100,000	\$100,000	—	\$100,000	—
COUNCIL OF THE GREAT CITY SCHOOLS (Washington, D.C.) — To survey and analyze the role of assistant principals in large urban school districts across the country.	\$250,000	\$250,000	—	\$250,000	—
EDUCATION TRUST INC. (Washington, D.C.) — To disseminate ideas and information about school leadership	\$360,000	\$360,000	—	\$360,000	—
LEARNING FORWARD/NATIONAL STAFF DEVELOPMENT COUNCIL (Dallas, Tex.) — To disseminate ideas and information about school leadership (and other education matters, such as summer learning) through conferences and other means.	\$340,000	\$340,000	—	\$340,000	—
NATIONAL ASSOCIATION OF ELEMENTARY SCHOOL PRINCIPALS (Alexandria, Va.) — To share ideas about school leadership with elementary school principals through speaking engagements and other means.	\$225,000	\$150,000	—	\$225,000	—
NATIONAL ASSOCIATION OF SECONDARY SCHOOL PRINCIPALS (Reston, Va.) — To share ideas about school leadership with secondary school principals through speaking engagements and other means.	\$200,000	—	—	\$200,000	—
NATIONAL ASSOCIATION OF STATE BOARDS OF EDUCATION (Alexandria, Va.) — To share ideas and information about school leadership through speaking engagements and other means.	\$300,000	\$300,000	—	\$300,000	—
NEW LEADERS (New York, N.Y.) — To develop tools to help states improve principal preparation programs.	\$250,000	\$250,000	—	\$250,000	—
POLICY STUDIES ASSOCIATES, INC. (Washington, D.C.) — To conduct an evaluation of the Principal Pipeline Initiative.	\$3,500,000	—	\$1,400,000	\$1,000,000	\$1,100,000
RAND CORPORATION (Santa Monica, Calif.) — To conduct a study of the costs of principal pipelines.	\$563,500	—	—	\$300,000	\$263,500

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
THE BOARD OF TRUSTEES OF ILLINOIS STATE UNIVERSITY (Normal, Ill.) — To review the process of recrediting principal preparation programs in Illinois.	\$75,000	\$75,000	–	\$75,000	–
THE UNIVERSITY COUNCIL FOR EDUCATIONAL ADMINISTRATION (Charlottesville, Va.) — To disseminate ideas and information about school leadership and principal training programs.	\$250,000	\$250,000	–	\$250,000	–
VANDERBILT UNIVERSITY (Nashville, Tenn.) — To study the "SAM process" for building principal effectiveness and assess the utility of a larger evaluation of the process.	\$159,336		\$75,000	\$34,336	\$50,000
WNET (New York, N.Y.) — To produce videos profiling the practices of successful principals.	\$200,000	\$200,000	–	\$200,000	–
OTHER RELATED EXPENSES — Activities including distribution of the Principal Story documentary and technical assistance for the principal pipeline effort research.	\$121,560	\$100,000	–	\$21,560	\$100,000

PRINCIPAL SUPERVISOR INITIATIVE

1. DEVELOP INNOVATION SITES

These grants and contracts support Wallace's Principal Supervisor Initiative, which is helping 14 urban school districts shift the principal supervisor role so that supervisors can work more effectively with principals to raise the quality of teaching and learning in schools.

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
AMERICAN ASSOCIATION OF SCHOOL ADMINISTRATORS (Alexandria, Va.) — To build specialized skills so the association can support districts in the principal supervisor Initiative.	\$100,000	\$100,000	–	\$100,000	–
BANK STREET COLLEGE OF EDUCATION (New York, N.Y.) — To build specialized skills so Bank Street can support districts in the Principal Supervisor Initiative.	\$100,000	\$100,000	–	\$100,000	–
THE CHARLOTTE-MECKLENBURG BOARD OF EDUCATION (Charlotte, N.C.) — To support principal supervisors in the Charlotte-Mecklenburg school district.	\$1,000,000	\$1,000,000	–	\$1,000,000	–
CLEVELAND BOARD OF EDUCATION (Cleveland, Ohio) — To enable the Cleveland school district to participate in the Principal Supervisor Initiative.	\$500,000	\$500,000	–	\$500,000	–
COUNCIL OF THE GREAT CITY SCHOOLS (WASHINGTON, D.C.) — To help districts applying for the Principal Supervisor Initiative plan their work.	\$300,000	\$300,000	–	\$300,000	–
D.C. PUBLIC EDUCATION FUND (WASHINGTON, DC) — To enable the Washington, D.C., school district to participate in the Principal Supervisor Initiative.	\$700,000	\$700,000	–	\$670,000	\$30,000
DEKALB COUNTY SCHOOL DISTRICT (Stone Mountain, Ga.) — To enable the DeKalb County school district to participate in the Principal Supervisor Initiative.	\$500,000	\$500,000	–	\$500,000	–
DENVER PUBLIC SCHOOLS FOUNDATION (Denver, Colo.) — To support principal supervisors in the Denver school district.	\$430,000	\$430,000	–	\$430,000	–

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
DES MOINES INDEPENDENT COMMUNITY SCHOOL DISTRICT (Des Moines, Iowa) — To enable the Des Moines school district to participate in the Principal Supervisor Initiative.	\$500,000	\$500,000	–	\$500,000	–
DISCOVERY EDUCATION (Silver Spring, Md.) — To measure the effectiveness of school leaders in districts applying for the Principal Supervisor Initiative.	\$500,000	\$500,000	–	\$500,000	–
THE FUND FOR PUBLIC SCHOOLS, INC. (New York, N.Y.) — To support principal supervisors in the New York City school district.	\$750,000	\$750,000	–	\$750,000	–
GWINNETT COUNTY BOARD OF EDUCATION (Suwanee, Ga.) — To support principal supervisors in the Gwinnett County school district.	\$520,000	\$520,000	–	\$520,000	–
LONG BEACH UNIFIED SCHOOL DISTRICT (Long Beach, Calif.) — To enable the Long Beach school district to participate in the Principal Supervisor Initiative.	\$500,000	\$500,000	–	\$500,000	–
NEW LEADERS (New York, N.Y.) — To build specialized skills so New Leaders can support districts participating in the Principal Supervisor Initiative.	\$100,000	\$100,000	–	\$100,000	–
THE NYC LEADERSHIP ACADEMY, INC. (Long Island City, N.Y.) — To manage a professional learning community of districts participating in the Principal Supervisor Initiative.	\$500,000	\$500,000	–	\$500,000	–
THE NYC LEADERSHIP ACADEMY, INC. (Long Island City, N.Y.) — To organize a conference for districts invited to apply for the Principal Supervisor Initiative.	\$130,000	\$50,000	\$40,000	\$90,000	–
PRINCE GEORGE'S COUNTY BOARD OF EDUCATION (Upper Marlboro, Md.) — To support principal supervisors in the Prince George's County school district.	\$700,000	\$700,000	–	\$700,000	–
THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA (Pompano Beach, Fla.) — To enable the Broward County school district to participate in the Principal Supervisor Initiative.	\$500,000	\$500,000	–	\$500,000	–
THE SCHOOL BOARD OF HILLSBOROUGH COUNTY, FLORIDA (Tampa, Fla.) — To support principal supervisors in the Hillsborough County school district.	\$500,000	\$500,000	–	\$500,000	–
SPECIAL SCHOOL DISTRICT NO. 1 (Minneapolis, Minn.) — To enable the Minneapolis school district to participate in the Principal Supervisor Initiative.	\$500,000	\$500,000	–	\$500,000	–
TULSA PUBLIC SCHOOL DISTRICT NO. 1 (Tulsa, Okla.) — To enable the Tulsa school district to participate in the Principal Supervisor Initiative.	\$800,000	\$800,000	–	\$770,000	\$30,000
OTHER RELATED EXPENSES — Support to plan for and manage the initiative.	\$359,199	\$278,648	–	\$272,400	\$86,799

2. DEVELOP AND SHARE KNOWLEDGE

MATHEMATICA POLICY RESEARCH, INC. (Princeton, N.J.) — To conduct an evaluation of the Principal Supervisor Initiative.	\$2,500,000	\$2,500,000	–	–	\$2,500,000
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OTHER EDUCATION LEADERSHIP PROJECTS

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
ARABELLA ADVISORS (Washington, D.C.) — To help build a learning community for the Education Leaders Network.	\$67,975	\$67,975	–	\$16,111	\$51,864
COUNCIL OF CHIEF STATE SCHOOL OFFICERS (Washington, D.C.) — To update the 2008 Interstate School Leaders Licensure Consortium's standards for school leaders.	\$125,000	\$125,000	–	\$125,000	–
NATIONAL CENTER ON EDUCATION AND THE ECONOMY (Washington, D.C.) — To provide matching funds for a federal Investing in Innovation grant to the National Institute for School Leadership.	\$600,000	\$600,000	–	\$600,000	–
PAUL MANNA AND SUSAN F. MOFFITT — To co-author a report on the role states can play to promote better school leadership.	\$129,600	\$129,600	–	\$72,800	\$56,800
SOUTHERN ILLINOIS UNIVERSITY EDWARDSVILLE (Edwardsville, Ill.) — To study the effects of an Illinois law that requires principal training programs to meet new state accreditation requirements.	\$50,000	\$50,000	–	\$50,000	–
THE ASPEN INSTITUTE (Washington, D.C.) — To conduct seminars for U.S. Congressional staffers on education leadership issues.	\$35,000	\$35,000	–	\$35,000	–
TOTAL	\$43,277,438	\$38,307,408	\$1,694,659	\$37,166,791	\$4,415,988

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

1. DEVELOP INNOVATION SITES

CITYWIDE AFTERSCHOOL SYSTEMS – These grants support efforts in nine cities to develop and test coordinated, citywide approaches to increasing participation in high-quality afterschool learning opportunities for children and teens.

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY (Stanford, Calif.) — To provide technical assistance to the nine cities participating in Wallace’s afterschool system building initiative.	\$300,000	\$300,000	–	\$179,002	\$120,998
CITY OF FORT WORTH, PARKS AND COMMUNITY SERVICES DEPARTMENT (Fort Worth, Tex.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$750,000	–	\$15,000
CITY OF GRAND RAPIDS, OUR COMMUNITY’S CHILDREN (Grand Rapids, Mich.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$750,000	–	\$15,000
CITY OF SAINT PAUL - DEPARTMENT OF PARKS AND RECREATION (Saint Paul, Minn.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$745,750	–	\$19,250
COLLABORATIVE COMMUNICATIONS GROUP (Washington, D.C.) — To help the nine cities in the afterschool systems initiative build their communications skills.	\$85,000	\$85,000	–	\$55,000	\$30,000
THE COMMUNITY FOUNDATION OF MIDDLE TENNESSEE (Nashville, Tenn.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$739,250	–	\$25,750
CROSS & JOFTUS, LLC (Bethesda, Md.) — To provide technical assistance to the nine cities participating in the afterschool system building initiative and to document the development of governance structures for afterschool systems.	\$400,000	\$310,000	\$55,000	\$261,000	\$84,000
FAMILY LEAGUE OF BALTIMORE CITY, INC. (Baltimore, Md.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$745,375	–	\$19,625
THE FORUM FOR YOUTH INVESTMENT (Washington, D.C.) — To provide technical assistance for afterschool system building in Baltimore, Md., and Fort Worth, Tex.	\$46,675	\$46,675	–	\$46,675	–
FUND FOR PHILADELPHIA INC. (Philadelphia, Pa.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$750,000	–	\$15,000
JACKSONVILLE CHILDREN’S COMMISSION (Jacksonville, Fla.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$479,987	\$270,013	\$15,000
MAYOR’S OFFICE FOR EDUCATION AND CHILDREN, CITY AND COUNTY OF DENVER (Denver, Colo.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$546,275	\$203,366	\$15,359
METRO UNITED WAY, INC. (Louisville, Ky.) — To fund the city’s participation in the afterschool systems effort.	\$765,000		\$695,261	–	\$69,739

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
NATIONAL LEAGUE OF CITIES INSTITUTE (Washington, D.C.) — To help coordinate the afterschool system building initiative.	\$1,000,000		\$600,434	\$307,987	\$91,579
WELLESLEY COLLEGE (Wellesley, Mass.) — To provide technical assistance to the nine cities participating in the afterschool system building initiative.	\$210,000	\$210,000	–	\$118,750	\$91,250
OTHER RELATED EXPENSES — Program management assistance.	\$418,919	\$215,481	\$138,989	\$216,892	\$63,038

2. DEVELOP AND SHARE KNOWLEDGE

AFTERSCHOOL ALLIANCE (Washington, D.C.) — To disseminate ideas and information about high-quality afterschool programs.	\$105,000	\$105,000	–	\$105,000	–
AMERICAN YOUTH POLICY FORUM (Washington, D.C.) — To share information on policy changes and disseminate ideas and information about high-quality afterschool programs.	\$135,000	\$135,000	–	\$135,000	–
CHAPIN HALL CENTER FOR CHILDREN AT THE UNIVERSITY OF CHICAGO (Chicago, Ill.) — To capture insights into how cities make sense of and use data to improve the quantity and quality of afterschool programming.	\$1,799,999		\$1,000,000	–	\$799,999
THE INSTITUTE FOR EDUCATIONAL LEADERSHIP, INC. (Washington, D.C.) — To disseminate ideas and information about high-quality afterschool programs.	\$50,000	\$50,000	–	\$50,000	–
MASSACHUSETTS AFTERSCHOOL PARTNERSHIP (Boston, Mass.) — To support a statewide afterschool network in Massachusetts.	\$50,000	\$50,000	–	\$50,000	–
NATIONAL AFTERSCHOOL ASSOCIATION (Oakton, Va.) — To help disseminate ideas and information about afterschool to afterschool service providers across the country.	\$100,000	\$100,000	–	\$100,000	–
NATIONAL AFTERSCHOOL ASSOCIATION (Oakton, Va.) — To sponsor the 2014 National Afterschool Association convention.	\$25,000	\$25,000	–	\$25,000	–
NATIONAL LEAGUE OF CITIES INSTITUTE (Washington, D.C.) — To disseminate ideas and information about high-quality afterschool programming.	\$230,000	\$230,000	–	\$230,000	–
THE AFTER-SCHOOL CORPORATION (New York, N.Y.) — To disseminate ideas and information about high-quality afterschool programming.	\$150,000	\$150,000	–	\$150,000	–
THE AFTER-SCHOOL CORPORATION (New York, N.Y.) — To test a new tool to help afterschool systems set their goals and measure their progress.	\$1,000,000	\$1,000,000	–	\$545,000	\$455,000
THE AFTER-SCHOOL CORPORATION (New York, N.Y.) — To support the New York State Afterschool Network, a statewide afterschool network.	\$50,000	\$50,000	–	\$50,000	–
UNITED WAY OF RHODE ISLAND (Providence, R.I.) — To support a statewide afterschool network in Rhode Island.	\$50,000	\$50,000	–	\$50,000	–
VOICES FOR ILLINOIS CHILDREN, INC. (Chicago, Ill.) — To support a statewide afterschool network in Illinois.	\$50,000	\$50,000	–	\$50,000	–
OTHER RELATED EXPENSES — Afterschool events, attendance at meetings and editorial support.	\$23,580	\$23,580	–	\$23,580	–

STRENGTHENING FINANCIAL MANAGEMENT – This effort seeks to strengthen the financial management of nonprofit organizations that provide high-quality afterschool programs to children and teens in Chicago — and to share financial management expertise with afterschool nonprofits nationwide.

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
CENTER FOR APPLIED RESEARCH (Philadelphia, Pa.) — To conduct an assessment of Wallace-funded workshops and webinars on strengthening the financial management of youth-serving nonprofits.	\$38,500	\$3,500	\$10,000	\$28,500	–
DONORS FORUM (Chicago, Ill.) — To help improve payment and contracting practices in state funding of afterschool and other nonprofit organizations.	\$895,000		\$315,000	\$580,000	–
FISCAL MANAGEMENT ASSOCIATES (New York, N.Y.) — To work with Wallace to deliver a series of financial management workshops and webinars to nonprofit afterschool providers, and to update the contents of the StrongNonprofits.org website.	\$339,280	–	\$132,000	\$183,500	\$23,780
ORGANIZATIONAL SERVICES, INC. (Ann Arbor, Mich.) — To help manage a series of financial management workshops and webinars for nonprofit afterschool providers.	\$303,236		\$276,000	–	\$27,236

OTHER AFTERSCHOOL PROJECTS

GRANTMAKERS FOR EDUCATION (Portland, Ore.) — To support the Out-of-School Time Funder Network.	\$52,901	\$52,901	–	\$27,901	\$25,000
TOTAL	\$14,793,090	\$3,242,137	\$8,729,321	\$4,042,166	\$2,021,603

**SUMMER AND
EXPANDED
LEARNING**

Our goal is to improve summer learning opportunities for disadvantaged children, and to enrich and expand the school day.

1. DEVELOP INNOVATION SITES

SUMMER LEARNING – These grants and contracts support Wallace’s summer learning district demonstration project, which is helping selected school districts to build strong summer learning programs on a wide scale and then evaluate the results for children.

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
BIG THOUGHT (Dallas, Tex.) — To support the Dallas Independent School District’s 2014 Thriving Minds summer camp program as part of Wallace’s summer learning district demonstration.	\$1,555,000		\$1,000,000	\$555,000	–
THE COMMUNITY FOUNDATION FOR NORTHEAST FLORIDA, INC. (Jacksonville, Fla.) — To support summer-learning providers offering services in Duval County Public Schools as part of Wallace’s summer learning district demonstration.	\$250,000		–	\$250,000	–
CROSBY MARKETING COMMUNICATIONS (Annapolis, Md.) — To assist summer learning demonstration districts in communicating to parents about the benefits of summer learning and to encourage enrollment in the programs.	\$1,432,362	\$629,999	\$764,011	\$38,335	\$630,015
DALLAS INDEPENDENT SCHOOL DISTRICT (Dallas, Tex.) — To support Dallas Independent School District’s 2014 Thriving Minds summer camp program as part of Wallace’s summer learning district demonstration.	\$1,200,000		–	\$1,200,000	–
NEW LEGACY PARTNERSHIPS, LLC (Kennebunk, Me.) — To help summer learning demonstration districts strengthen curriculum, professional development and planning for summer programs.	\$440,627	\$336,179	\$67,085	\$152,382	\$221,160
PITTSBURGH PUBLIC SCHOOLS (Pittsburgh, Penn.) — To support Pittsburgh Public Schools’ 2014 summer learning program as part of Wallace’s summer learning district demonstration.	\$1,289,100		–	\$1,289,100	–
ROCHESTER AREA COMMUNITY FOUNDATION (Rochester, N.Y.) — To support the Rochester City School District’s 2014 summer learning program as part of Wallace’s summer learning district demonstration.	\$99,687		–	\$99,687	–
ROCHESTER CITY SCHOOL DISTRICT (Rochester, N.Y.) — To support the Rochester City School District’s 2014 summer learning program as part of Wallace’s summer learning district demonstration.	\$1,107,801		–	\$1,107,801	–
THE SCHOOL BOARD OF DUVAL COUNTY, FLORIDA (Jacksonville, Fla.) — To support Duval County Public Schools’ 2014 summer learning program as part of Wallace’s summer learning district demonstration.	\$1,316,000		–	\$1,316,000	–
THE LEARNING AGENDA, LLC (Springfield, Pa.) — To manage a professional learning community for districts participating in Wallace’s summer learning district demonstration, and to assist the participating districts in developing plans for their programming.	\$375,748	\$285,027	\$45,859	\$148,686	\$181,203
OTHER RELATED EXPENSES — Travel, speaker and other meeting expenses.	\$77,414	\$69,276	–	\$77,414	–

SUPPORT LEADING EXPANDED LEARNING ORGANIZATIONS – These grants support leading nonprofits with promising work under way to expand learning opportunities for children and teens.

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
THE B.E.L.L. FOUNDATION, INC. (Dorchester, Mass.) — To provide general operating support to this organization.	\$750,000	\$750,000	–	\$750,000	–
THE B.E.L.L. FOUNDATION, INC. (Dorchester, Mass.) — To refine BELL's model to provide expanded learning opportunities in middle schools.	\$50,000	\$50,000	–	\$50,000	–
CITIZEN SCHOOLS, INC. (Boston, Mass.) — To support Citizen Schools as it refines its operating model and expands it to serve more children.	\$1,125,000	\$1,125,000	–	\$1,125,000	–
COMMUNITIES IN SCHOOLS (Arlington, Va.) —To support Communities in Schools as it refines its operating model and expands it to serve more children.	\$1,500,000	\$1,500,000	–	\$1,500,000	–
FSG (Boston, Mass.) — To study a summer learning effort by the YMCA and BELL.	\$73,900	–	\$48,900	\$25,000	–
HIGHER ACHIEVEMENT PROGRAM (Washington, D.C.) — To provide general operating support to this organization.	\$785,000	\$785,000	–	\$785,000	–
HORIZONS NATIONAL STUDENT ENRICHMENT PROGRAM (Norwalk, Conn.) — To provide general operating support to this organization.	\$600,000	\$600,000	–	\$600,000	–
NATIONAL COUNCIL OF YOUNG MENS CHRISTIAN ASSNS OF THE USA (Chicago, Ill.) — To operate a summer learning program partnership with the BELL organization.	\$600,000	\$600,000	–	\$600,000	–
SAY YES TO EDUCATION, INC. (New York, N.Y.) — To support a citywide effort to boost education and other opportunities for young people in Buffalo, N.Y.	\$4,500,000	–	\$2,000,000	\$1,000,000	\$1,500,000
THE AFTER-SCHOOL CORPORATION (New York, N.Y.) — To provide general operating support to this organization.	\$1,978,000	\$1,978,000	–	\$1,000,000	\$978,000
THE LEARNING AGENDA, LLC (Springfield, Penn.) — To manage a professional learning community for expanded-learning program providers.	\$362,225	\$250,000	\$84,804	\$217,421	\$60,000
OTHER RELATED EXPENSES — Meeting costs.	\$667	\$667	–	\$667	–

2. DEVELOP AND SHARE KNOWLEDGE

CROSS & JOFTUS, LLC (Bethesda, Md.) — To develop a framework for expanded learning organizations to assess their programming's alignment with the Common Core State Standards.	\$250,000	–	\$170,000	\$80,000	\$0
THE FORUM FOR YOUTH INVESTMENT (Washington, D.C.) — To help develop a tool to assess the quality of summer learning programs.	\$100,000	–	\$0	\$100,000	\$0
HORIZONS NATIONAL STUDENT ENRICHMENT PROGRAM (Norwalk, Conn.) — To conduct a study to determine the feasibility of a randomized controlled trial and an implementation analysis of the Horizons program.	\$125,000	–	\$75,000	\$50,000	\$0
MATHEMATICA POLICY RESEARCH, INC. (Princeton, N.J.) — To administer math and ELA assessments to students participating in Wallace's summer learning district demonstration.	\$1,688,490	\$1,688,490	\$0	\$1,535,583	\$152,907

MDRC (New York, N.Y.) — To complete an evaluation of Communities in Schools' expanded learning programs.	\$495,000	—	\$195,000	\$250,000	\$50,000
NATIONAL CENTER ON TIME & LEARNING (Boston, Mass.) — To disseminate information and ideas about expanded learning.	\$100,000	\$100,000	—	\$75,000	\$25,000
NATIONAL SUMMER LEARNING ASSOCIATION, INC. (Baltimore, Md.) — To disseminate information and ideas about summer learning.	\$250,000	\$250,000	—	\$250,000	—
POLICY STUDIES ASSOCIATES, INC. (Washington, D.C.) — To conduct an evaluation of a summer learning partnership between the Y and the BELL Foundation.	\$200,000	\$200,000	—	\$200,000	—
RAND CORPORATION (Santa Monica, Calif.) — To conduct research about and an evaluation of the summer learning district demonstration project.	\$5,700,000	\$700,000	\$4,400,000	\$800,000	\$500,000
THE AFTER-SCHOOL CORPORATION (New York, N.Y.) — To support an evaluation of the ExpandED Schools national demonstration.	\$472,000	\$472,000	—	\$236,000	\$236,000
OTHER RELATED EXPENSES — Project management support.	\$21,788	\$21,788	—	\$21,788	—

OTHER SUMMER AND EXPANDED LEARNING PROJECTS

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
DIFFUSION ASSOCIATES, LLC (East Lansing, Mich.) — To conduct a research study that examines how collaborations have been used to spread social innovations.	\$722,302	\$722,302	—	\$50,000	\$672,302
HIGHER ACHIEVEMENT PROGRAM (Washington, D.C.) — To provide matching funds for a federal Investing in Innovation grant for Higher Achievement's expanded-learning programs.	\$200,000	\$200,000	—	\$200,000	—
PRESIDENT AND FELLOWS OF HARVARD COLLEGE (Cambridge, Mass.) — To provide matching funds for a federal Investing in Innovation grant to Project READS.	\$57,776	\$57,776	—	\$57,776	—
TEACHERS COLLEGE, COLUMBIA UNIVERSITY (New York, N.Y.) — To conduct a study determining whether and how major community institutions across sectors can work together towards education reform.	\$845,000	\$46,000	—	\$346,000	\$499,000
UNIVERSITY OF CHICAGO (Chicago, Ill.) — To develop a framework for understanding the social-emotional factors that contribute to young people's readiness for college and careers.	\$700,000		\$500,000	\$100,000	\$100,000
WINGS FOR KIDS (Charleston, S.C.) — To provide matching funds for a federal Social Innovation Fund grant to assist WINGS in expanding its efforts to help elementary school children build social and emotional skills.	\$410,000	\$410,000	—	\$210,000	\$200,000
OTHER RELATED EXPENSES — Travel for planning for a research project on spreading innovation.	\$5,761	\$5,761	—	\$5,761	—
TOTAL	\$33,811,648	\$13,833,265	\$9,350,659	\$18,455,401	\$6,005,587

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

1. DEVELOP INNOVATION SITES

These grants and contracts help efforts to raise the quality and availability of arts education for young people.

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
BOYS & GIRLS CLUBS OF AMERICA (Atlanta, Ga.) — To develop and run high-quality, year-round arts programming for tweens in six clubhouses.	\$5,350,000	–	\$1,130,000	\$1,960,000	\$2,260,000
DEVELOPMENT WITHOUT LIMITS, LLC (New York, N.Y.) — To manage a learning community of the Boys & Girls Clubs participating in the arts-for-tweens project.	\$28,679	\$28,679	–	\$28,679	–
EDVESTORS INCORPORATED (Boston, Mass.) — To support a four-year plan to increase access to and the equitable distribution of high-quality arts education in Boston Public Schools.	\$3,740,000	–	\$2,660,000	\$956,570	\$123,430
NEXT LEVEL STRATEGIC MARKETING GROUP, LLC (Pleasantville, N.Y.) — To help manage the arts education effort at the Boys & Girls Club of America, and to disseminate research that informed the initiative.	\$612,576	\$72,550	\$84,922	\$351,916	\$175,738
OTHER RELATED EXPENSES — Travel for planning for a new professional learning community for grantees.	\$2,937	\$2,937	–	\$2,937	–

2. DEVELOP AND SHARE KNOWLEDGE

RESEARCH FOR ACTION, INC. (Philadelphia) — To conduct a study of the Boys & Girls Clubs of America's arts learning programs.	\$1,590,000	\$90,000	\$510,000	\$340,000	\$740,000
OTHER RELATED EXPENSES — Presentations, printing costs and other activities related to the publication of <i>Something to Say</i> , a report on how to fashion high-quality arts programming for young people.	\$112,047	\$68,263	–	\$98,952	\$13,095
TOTAL	\$11,436,239	\$262,429	\$4,384,922	\$3,739,054	\$3,312,263

1. DEVELOP INNOVATION SITES

The Building Audiences for Sustainability Initiative, announced in October 2014 for launch in 2015, aims to help performing arts organizations design and carry out programs to attract new audiences while retaining current ones, measuring whether and how this contributes to their overall financial health.

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
S. RADOFF ASSOCIATES LLC (Bronx, N.Y.) — To advise Wallace on a baseline survey of arts organizations regarding audience-building, conduct market research about audience-building terminology and manage Wallace's concluding Wallace Excellence Awards effort.	\$294,600	\$16,400	\$174,650	\$116,450	\$3,500
TECHNICAL DEVELOPMENT CORPORATION (Boston, Mass.) — To conduct research to help identify a pool of potential grantees for the new arts initiative.	\$199,419	\$199,419	—	\$108,000	\$91,419

2. DEVELOP AND SHARE KNOWLEDGE

AMERICAN ASSOCIATION OF MUSEUMS (Washington, D.C.) — To share lessons learned from the foundation's Wallace Excellence Awards effort, which concluded in 2014.	\$25,000	\$25,000	—	\$25,000	—
AMERICAN SYMPHONY ORCHESTRA LEAGUE (New York, N.Y.) — To share lessons learned from the Wallace Excellence Awards and the Building Audiences for Sustainability initiative.	\$275,000	\$275,000	—	\$275,000	—
ARTSJOURNAL.COM (Seattle, Wash.) — To create a special section dedicated to ways in which arts organizations can engage and expand audiences.	\$30,000	\$30,000	—	\$30,000	—
ASSOCIATION OF PERFORMING ARTS PRESENTERS (Washington, D.C.) — To share lessons learned from the Wallace Excellence Awards and the Building Audiences for Sustainability initiative.	\$275,000	\$275,000	—	\$275,000	—
BOB HARLOW RESEARCH AND CONSULTING, LLC (New York, N.Y.) — To conduct a two-phase evaluation of the foundation's Wallace Excellence Awards effort.	\$1,300,000		\$1,188,000	\$21,950	\$90,050
CHAMBER MUSIC AMERICA (New York, N.Y.) — To share lessons learned from the Wallace Excellence Awards and the Building Audiences for Sustainability initiative.	\$275,000	\$275,000	—	\$275,000	—
DANCE USA (Washington, D.C.) — To share lessons learned from the Wallace Excellence Awards and the Building Audiences for Sustainability initiative.	\$275,000	\$275,000	—	\$275,000	—
OPERA AMERICA (New York, N.Y.) — To contribute to deliberations on new arts strategies and to share lessons learned from the Wallace Excellence Awards and the Building Audiences for Sustainability initiative.	\$276,000	\$275,000	—	\$276,000	—
RESNICOW SCHROEDER ASSOCIATES, INC. (New York, N.Y.) — To help plan and execute communications activities related to the Building Audiences for Sustainability initiative.	\$386,289	\$386,289	—	\$109,231	\$277,058

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
SHUGOLL RESEARCH (Bethesda, Md.) — To conduct a survey to determine baselines for arts organizations' efforts to build audiences.	\$101,860	\$101,860	—	\$92,600	\$9,260
THEATRE COMMUNICATIONS GROUP, INC. (New York, N.Y.) — To share lessons learned from the Wallace Excellence Awards and the Building Audiences for Sustainability initiative.	\$275,000	\$275,000	—	\$275,000	—
OTHER RELATED EXPENSES — Activities including research and planning for development of the new Building Audience for Sustainability initiative, management of the concluding Wallace Excellence Awards effort and sponsorship of arts conferences.	\$188,590	\$116,902	\$57,350	\$121,615	\$9,625

**OTHER AUDIENCE DEVELOPMENT
FOR THE ARTS PROJECTS**

GRANTMAKERS IN THE ARTS (Seattle, Wash.) — To support the Arts Education Funders Coalition.	\$60,000	\$60,000	—	\$60,000	—
TOTAL	\$4,236,758	\$2,585,870	\$1,420,000	\$2,335,846	\$480,912

**COMMUNICA-
TIONS**

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
ACRONYM MEDIA (New York, N.Y.) — To provide search-engine marketing services and consultation.	\$623,158	\$322,338	\$270,886	\$317,240	\$35,032
BIG THINK STUDIOS (San Francisco, Calif.) — To build awareness among field leaders of new Wallace publications.	\$202,424	\$119,947	\$54,750	\$147,674	–
KENNESAW STATE UNIVERSITY RESEARCH AND SERVICE FOUNDATION, INC. (Kennesaw, Ga.) — To support Youth Today.	\$300,000	\$200,000	–	\$300,000	–
THE HATCHER GROUP (Bethesda, Md.) — To provide communications services to disseminate ideas and information from Wallace's efforts to policymakers, practitioners and others.	\$1,034,422	\$523,070	\$477,997	\$496,412	\$60,013
NEXT LEVEL STRATEGIC MARKETING GROUP, LLC (Pleasantville, N.Y.) — To undertake market research to help Wallace become more effective in disseminating ideas and information.	\$143,750	\$28,750	\$40,000	\$103,750	–
OTHER RELATED EXPENSES — Activities including presentations, conferences, advertising, production of promotional materials, and editorial and publication/video production work.	\$129,449	\$124,949	\$3,500	\$98,449	\$27,500
TOTAL	\$2,433,203	\$1,319,054	\$847,133	\$1,463,525	\$122,545

**SERVICE TO THE
FIELD OF
PHILANTHROPY**

	TOTAL AS OF 12/31/14	APPROVED 2014	PAID BEFORE 2014	PAID 2014	FUTURE PAYMENTS
THE CENTER FOR EFFECTIVE PHILANTHROPY (Cambridge, Mass.) — To provide general operating support and to support the preparation of a grantee perception report for Wallace.	\$100,000	\$100,000	—	\$100,000	—
COMMUNICATIONS NETWORK (Washington, D.C.) — To support this nonprofit membership organization, whose mission is to provide resources, guidance and leadership to advance communications in philanthropy.	\$15,000	\$15,000	—	\$15,000	—
COUNCIL OF CHIEF STATE SCHOOL OFFICERS (Washington, D.C.) — To support the work of the Arts Education Partnership.	\$25,000	\$25,000	—	\$25,000	—
COUNCIL ON FOUNDATIONS, INC. (Arlington, Va.) — To support this national, nonprofit membership organization for grantmakers.	\$44,500	\$44,500	—	\$44,500	—
FJC (New York, N.Y.) — To support the 2014 program activities of the New York City Youth Funders.	\$3,000	\$3,000	—	\$3,000	—
FOUNDATION CENTER (New York, N.Y.) — To support this national clearinghouse of information on private grantmaking.	\$75,000	\$75,000	—	\$75,000	—
FOUNDATION CENTER (New York, N.Y.) — To support the design, construction and relocation of the Foundation Center's headquarters.	\$100,000	\$100,000	—	\$100,000	—
GRANTMAKERS FOR EDUCATION (Portland, Ore.) — To support this membership organization for private and public philanthropies that support improved education from early childhood to the higher education years.	\$24,500	\$24,500	—	\$24,500	—
GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS (Washington, D.C.) — To support this national membership organization, which promotes learning among funders committed to building effective nonprofits.	\$250	\$250	—	\$250	—
GRANTMAKERS IN THE ARTS (Seattle, Wash.) — To support this nonprofit membership organization, whose mission is to provide leadership and service to advance the use of philanthropy for arts and culture.	\$21,500	\$21,500	—	\$21,500	—
GRANTS MANAGERS NETWORK (Washington, D.C.) — To support this national organization, which seeks to improve grantmaking by advancing the knowledge, skills and abilities of grants managers.	\$5,000	\$5,000	—	\$5,000	—
INDEPENDENT SECTOR (Washington, D.C.) — To support this nonprofit organization, whose mission is to advance the common good by leading, strengthening, and mobilizing the nonprofit and philanthropic community.	\$10,000	\$10,000	—	\$10,000	—
INDEPENDENT SECTOR (Washington, D.C.) — To update Principles for Good Governance and Ethical Practice: A Guide for Charities and Foundations, originally published in 2007.	\$35,000	\$35,000	—	\$35,000	—
INNOVATION NETWORK, INC. (Washington, D.C.) — To support the Evaluation Roundtable.	\$50,000	\$50,000	—	\$50,000	—
NATIONAL PUBLIC EDUCATION SUPPORT FUND (Washington, D.C.) — To support the Education Funder Strategy Group.	\$25,000	\$25,000	—	\$25,000	—

NONPROFIT COORDINATING COMMITTEE OF NEW YORK (New York, N.Y.) — To support this nonprofit, which serves some 1,700 nonprofits in New York City, Long Island and Westchester.	\$3,000	\$3,000	–	\$3,000	–
NYU STEINHARDT SCHOOL OF CULTURE, EDUCATION AND HUMAN DEVELOPMENT (New York, N.Y.) — To support the Research Alliance for New York City Schools.	\$300,000	–	\$100,000	\$200,000	–
PHILANTHROPY NEW YORK (New York, N.Y.) — To support the principal professional community of philanthropic foundations in the New York City region.	\$27,250	\$27,250	–	\$27,250	–
PHILANTHROPY NEW YORK (New York, N.Y.) — To support the relocation of the organization's offices and the creation of new meeting space for the local philanthropic community.	\$100,000	\$100,000	–	\$100,000	–
SPONSORS FOR EDUCATIONAL OPPORTUNITY, INC. (New York, N.Y.) — To support a program providing college undergraduates from underserved communities with training, coaching and internships in philanthropy.	\$15,000	\$15,000	–	\$15,000	–
EMPLOYEE MATCHING GIFTS	\$37,339	\$37,339	–	\$28,863	\$8,476
OTHER RELATED EXPENSES — To pay membership dues to the service-to-the-field organizations.	\$50,000	\$50,000	–	\$50,000	–
TOTAL	\$1,066,339	\$766,339	\$100,000	\$957,863	\$8,476

GRAND TOTAL	\$111,054,714	\$60,316,501	\$26,526,694	\$68,160,645	\$16,367,374
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**OTHER
GRANTS**

	TOTAL AS OF 12/31/14	AMOUNT APPROVED IN 2014	TOTAL PAID	AMOUNT PAID BEFORE JAN. 1, 2014	AMOUNT PAID IN 2014	FUTURE PAYMENTS
BUILDING AUDIENCES	\$4,236,758	\$2,585,870	\$4,236,758	\$1,420,000	\$2,335,846	\$480,912
ARTS EDUCATION	\$11,436,239	\$262,429	\$11,436,239	\$4,384,922	\$3,739,054	\$3,312,263
EDUCATION LEADERSHIP	\$43,277,438	\$38,307,408	\$43,277,438	\$1,694,659	\$37,166,791	\$4,415,988
AFTERSCHOOL	\$14,793,090	\$3,242,137	\$14,793,090	\$8,729,321	\$4,042,166	\$2,021,603
SUMMER AND EXPANDED LEARNING	\$33,811,648	\$13,833,265	\$33,811,647	\$9,350,659	\$18,455,401	\$6,005,587
COMMUNICATIONS	\$2,433,203	\$1,319,054	\$2,433,203	\$847,133	\$1,463,525	\$122,545
SERVICE TO THE FIELD	\$1,066,339	\$766,339	\$1,066,339	\$100,000	\$957,863	\$8,476
TOTAL	\$111,054,714	\$60,316,501	\$111,054,713	\$26,526,694	\$68,160,645	\$16,367,374
TOTAL FROM GRANTS ADMIN	\$110,825,073	\$60,086,860	\$110,825,072	\$26,526,694	\$67,939,480	\$16,358,898
OTHER EXPENSES FROM FINANCE	\$192,302	\$192,302	\$192,302	–	\$192,302	–
MATCHING GIFTS	\$37,339	\$37,339	\$37,339	–	\$28,863	\$8,476
GRAND TOTAL	\$111,054,714	\$60,316,501	\$111,054,713	\$26,526,694	\$68,160,645	\$16,367,374

FIND OUT MORE

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- Approach to grantmaking: <http://www.wallacefoundation.org/learn-about-wallace/approach-and-strategy/Pages/our-approach-to-philanthropy.aspx>
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The Wallace Foundation®

Supporting ideas.
Sharing solutions.
Expanding opportunities.®

Our mission is to foster improvements in learning and enrichment for disadvantaged children and the vitality of the arts for everyone. We seek to catalyze broad impact by supporting the development, testing and sharing of new solutions and effective practices.

The Wallace Foundation
5 Penn Plaza, 7th Floor
New York, NY 10001
212.251.9700 Telephone
info@wallacefoundation.org

www.wallacefoundation.org