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# Rooted in Opportunity

The Walton Family Foundation's Approach to  
Starting and Growing High-Quality Schools

WALTON FAMILY  
FOUNDATION

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# Executive Summary

**For three decades, the Walton Family Foundation has acted on the belief that all of America’s children deserve access to an excellent school – the kind of school that will allow them to realize their full potential and achieve rewarding work and a fulfilling life. That focus flows naturally from the Walton family’s belief that every child deserves a quality education – a concern that is especially urgent for families in low-income neighborhoods, who are most likely to lack quality options.**

Today, thanks to courageous school founders, leaders and teachers throughout the country, the progress is undeniable. Thousands upon thousands of students are on a path to college and career success. As a result, communities are healthier and more prosperous, children and families enjoy better lives and teachers have new professional paths. And at the same time, the national conversation has shifted. Where strong schools in low-income communities were once seen as improbable exceptions, a generation of such schools has proven beyond doubt what’s possible at real scale.

Yet, for far too many families, good schools remain out of reach. This reality is unacceptable, and parents know it. In cities, suburbs, small towns and beyond, parents are demanding schools that work for their children.<sup>1</sup>

This situation creates a simple imperative: to create more high-performing schools for students and families who need them. As the Foundation prepares for a fourth decade, we vigorously reaffirm our commitment to the work of growing opportunity in education. Likewise, we reaffirm our continued support for the strategies that have proven so successful over the years, and in particular for strong public charter schools. Yet we are also embracing new strategies. We believe it’s essential to take a both-and approach, continuing what has

worked in the past, while exploring new areas that show promise for setting young people on a path to success. We believe we can accelerate the creation of great schools, especially in the places they are needed most — and we are committed to doing that for all the reasons we entered this work a generation ago.

This report details what the Walton Family Foundation is doing to support leaders developing the schools, classrooms and teaching methods of the future, and, just as important, offers portraits of what that good work looks like in real life. We are fueling the growth of great public charter schools as well as new routes to excellent school creation — public charter, district and private. We are working alongside other philanthropic partners to grow impact. And we are partnering with organizations that advocate for strong public policies that create the conditions to fuel great public school growth. We are also supporting strong public policies holding states, cities and school systems accountable for meeting the commitment they’ve made to students and families. And while this report focuses on the creation of more high-quality schools, such efforts are part of the foundation’s broader investment in cities to spur system-wide educational improvement.

### Specifically, we expect to invest in the following areas:

- **Starting and scaling high-quality public charter schools:** We are deeply committed to the extraordinarily high-impact strategy of starting and scaling high-quality public charter schools within target cities — and we'll make even more of these investments, and at even earlier stages. This includes removing one of the biggest barriers to high-quality charter school growth — the process of finding and financing facilities — through the Foundation's Building Equity Initiative.
- **More diverse and innovative approaches:** We believe in the enormous potential of innovative school models. We are supporting schools that look and feel truly different, and those that tap into entirely new ways of educating students, especially students who are most academically at risk and underserved by traditional one-size-fits-all models.
- **District and private schools embracing accountability and autonomy:** We know that in order to achieve the growth and diversity of options we seek, public charter schools cannot be our only path to new school creation. Some of the most promising educational efforts in the country involve cross-sector combinations of district, charter, community and more, brought together by entrepreneurially-minded district leaders. These scenarios often include different governance models, such as district-managed restarts of struggling schools, charter-managed contracts and "innovation zones" that invite educators to open a wide range of new district schools. In addition, private schools, such as those receiving vouchers, can be part of the solution when they use public dollars and are accountable for helping students from low-income communities succeed.
- **More early-stage support for teachers and leaders of color:** We are increasing our support for teachers and entrepreneurs of color, working to break down barriers that keep educators, emerging entrepreneurs and leaders of color from opening and improving schools. To realize the vision of an excellent school for every child, a larger percentage of the teachers and leaders at both the school and system level must be representative of the communities that they seek to serve. To do this, we are supporting efforts that make it easier for seasoned leaders of color as well as first-time teachers and entrepreneurs to enter the classroom and launch and scale schools.
- **Navigating the transition from secondary to postsecondary — and beyond:** For many students, succeeding in college, and other postsecondary options, can be a greater challenge than getting there. We're investing in approaches that help more students transition to the next step, and the journey once there.
- **Meeting the unique needs of special student populations:** We are growing our support for efforts that focus on students with special needs, who make up 13 percent of public school enrollment but whose outcomes too rarely reach the potential we know they have. As part of that effort, we are actively seeking out organizations that take new approaches to helping students obtain the skills to overcome barriers on the pathway to a college degree or thriving career.
- **More schools that serve students of diverse backgrounds:** We are also seeding more schools that intentionally serve students of diverse socioeconomic and racial backgrounds. It's our belief that all children benefit from the experience of learning in a more diverse environment. Economic diversity helps break down barriers by class and race and bring children of different backgrounds together so they can learn from one another.

Together with other funders and the teachers, leaders, parents and students we seek to serve, the Walton Family Foundation aims to do more to help more children attend great schools that prepare them for success in college, career and life. It's the same commitment that has driven us for decades: to do everything in our power to ensure as many children as possible can access the kind of educational opportunity that is essential to the American dream.

Indeed, new schools and models are not our ultimate objective. The end we seek is improved outcomes for the next generation of young people: better possibilities, better opportunities and a brighter tomorrow. We will measure our impact not by the number of schools we help build, but by the number of children who can realize a better life. We're clear-eyed about the challenge ahead — and excited about supporting those who are already stepping up to lead.

## OUR K-12 THEORY OF CHANGE

The Walton Family Foundation's approach to K-12 education focuses on schools and systems of schools in tandem. As the report outlines in detail, we support the creation of new high-performing schools of all types, so that more students and families can have choices and opportunities.

While high-quality school options are necessary, they cannot alone stimulate systemic change. For every child to receive an education that prepares him or her for success in college, career and life, a wide range of people and organizations must work together to allow great schools of all types to grow and thrive.

This means that state and local policies must create the environment for leaders to think creatively and tailor educational opportunities to the needs of each child.

For a system of schools to work, we need the right conditions – shared enrollment platforms, equitable access to transportation, fair student-based, portable funding, sensible accountability approaches and clear information about school climate, parent satisfaction and school academic performance. Above all else, a system of great schools needs excellent teachers and leaders at every level. With these elements and support, and guidance from community members, students and families can live lives full of opportunity.

Our approach to grantmaking marries the urgency we feel to make change on behalf of the people and places we care most about with the patience to make an impact to improve lives today – that lasts to benefit future generations.

# INTRODUCTION

The Walton Family Foundation believes all children in America should have access to an excellent school that helps them reach their full potential and prepares them for a lifetime of opportunity. This vision started when Sam and Helen Walton established the Walton Family Foundation three decades ago, and was fortified in 1997 when the foundation made its first start-up planning grant to a pioneering team of teachers from Boston, MA who wanted to reimagine what school looked like and could do for children. It is this same spirit that guides our education work today.

Today, thanks to courageous school founders, leaders and teachers throughout the country, thousands of public schools are demonstrating widespread and enduring success, indicating that quality schools at scale are possible.

These schools are preparing students for college, career and life. They are strengthening the connections between families and educators. They are fostering stronger neighborhoods and local economies. They are driving a new sense of what's possible. And they are accountable to families, taxpayers and communities for whom so much is at stake.

**As the Foundation passes the 20th anniversary of its first grant to launch a new public charter school, we reaffirm our commitment to the growth of schools that work for students — including public charter schools, district schools and private schools. This report lays out how the Walton Family Foundation has historically supported the creation of new schools, and our evolved and expanded approach to the types of diverse and innovative schools we help start — so that more children can access a high-quality education and a lifetime of opportunity.**

Across the country, we see schools making good on the promise that all communities deserve high-quality school options. These schools are not a mirage: They are real school buildings filled with dedicated teachers and staff who are consistently delivering on the promise of a high-quality education for all.

But our approach to new school creation is also rooted in the sobering but undeniable reality that an excellent education is still out of reach for far too many children in America. Barely a third of children in public schools in this country are performing at or above the National Assessment of Educational Progress proficient level in reading<sup>ii</sup> and math<sup>iii</sup> and despite formidable progress over the last 25 years, pernicious racial and income gaps remain.<sup>iv</sup> And as we rely on our schools to prepare students for meaningful careers in the global economy, children in the United States trail many of their international peers on several important measures.<sup>v</sup>

Central to these challenges is a lack of access to excellent schools. Public schools that serve high numbers of black and Latino students offer fewer advanced math and science courses, such as calculus and physics, than schools with more white students.<sup>vi</sup> A recent Thomas B. Fordham Institute study found that nearly all states with charter schools are home to, on average, more than 10 “charter school deserts.”<sup>vii</sup> These deserts — defined as regions where many young people live in poverty and yet no charter schools exist — limit students’ educational options. Even when families live close to a quality school, their children may be barred entry because of enrollment restrictions or transportation barriers.

This situation demands a commitment to creating more high-performing schools for students and families who need them. Doing so will involve working with more partners across multiple sectors and directing attention and support to new frontiers. The Walton Family Foundation will do more to support the leaders developing the schools, classrooms and teaching methods of the future so that more children can access the schools they deserve.

“More” means increasing resources for schools and school models that work. We will build on decades of partnership with current grantees like Charter School Growth Fund, Building Excellent Schools and New Schools Venture Fund, and work with newer partners like Silicon Schools Fund.<sup>viii</sup> These are organizations that, time and time again, have shown they can recruit and support great educators to run great schools.

It also means underwriting new approaches that appeal to emerging and innovative teams of educators and communities looking for better and different schools. We will deliberately seek new models that foster quality and new partners that think differently about teaching and learning, such as Wildflower Schools, Reframe Labs and The Drexel Fund.

Our aspiration is that the same spirit of innovation that created today’s best schools will guide the development of new models, establishing not just additional excellent schools but a wider range of choices. That’s why, even as we support the continued growth of proven, high-quality models, we’ll also support schools and school systems that will look different from those that serve most students today.

But even in new schools, some crucial elements will not change. Fundamental to the continued success of schools is the capacity and willingness to be transparent and accountable for delivering a strong education. That’s why we will support strong public policies holding states, cities and school systems accountable for meeting the commitment they’ve made to students and families. These policies will go beyond reading and math proficiency: Our investments in researchers and partners will discover ways to measure the skills that students will need to succeed in tomorrow’s economy. Strong accountability has been essential to improvements in education, especially for the most vulnerable students in our country, and while accountability is essential to wise public policy, it requires continued support.

Likewise, the effort to create high-quality options for students relies on strong policy, particularly at the state level. The good news is that, despite a handful of noteworthy setbacks, there is considerable momentum for new, equitable and robust policies nationwide that will serve as the foundation of equitable, strong schools. To cite a few examples: A first-of-its-kind bill to equalize charter and traditional district funding passed with bipartisan support in Colorado.<sup>ix</sup> In Washington, D.C.<sup>x</sup> and New York City<sup>xi</sup>, leaders of public charter schools can now access more resources to find, secure and finance the facilities they need to serve students well. There is more to celebrate in places like Texas, Florida, Arizona and Georgia. Strong public policy creates the conditions for great schools to thrive, and it is imperative that leaders across the country continue to prioritize this.

The work of increasing the supply of great schools for communities and families in need is larger than any one organization. That is why the Walton Family Foundation actively seeks out and collaborates with a wide variety of philanthropic partners. With supportive public policies and multiple philanthropic organizations rowing in the same direction, we aim to work with others to deliver high-quality schools for every family in America.

Together with other funders and the teachers, leaders, parents and students we seek to serve, the Walton Family Foundation will help communities and our country move closer to ensuring that all children can attend great schools that prepare them for success in college, career and life. It’s the same commitment that has driven us for decades: to do everything in our power to ensure as many children as possible can access the educational opportunities that are essential to the American dream.

# SCHOOL STARTUP GIVING

TOTALS SINCE 1997

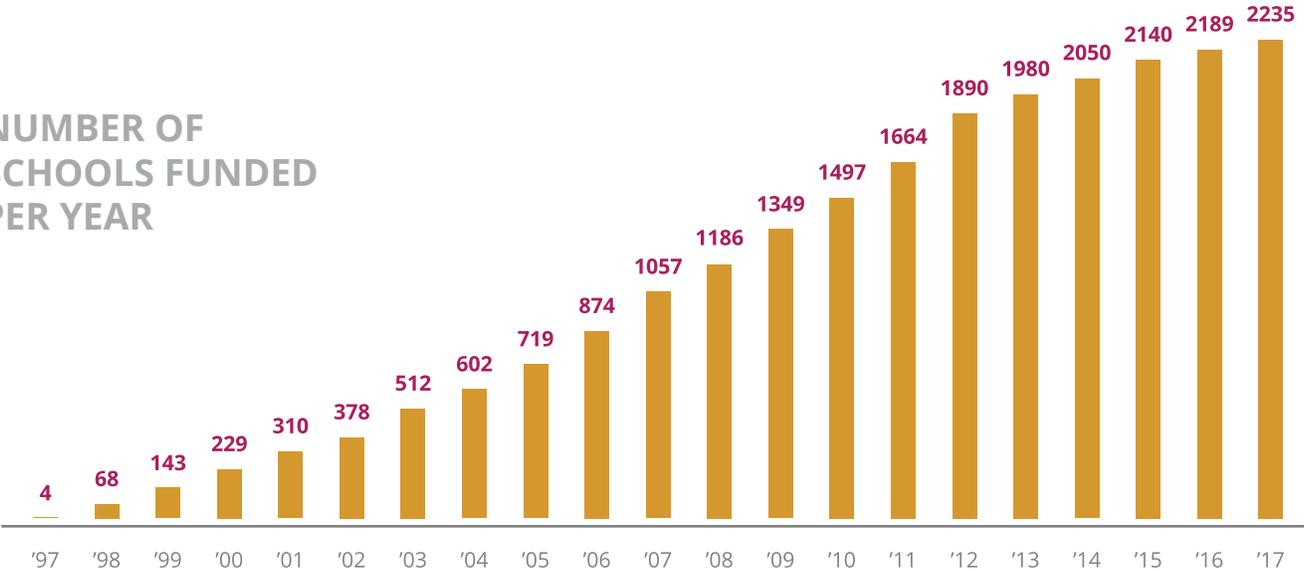
**2,235**

number of schools

**\$424 Million**

invested

NUMBER OF SCHOOLS FUNDED PER YEAR



## MILESTONES

**1997**

Made first startup grant

**1998**

Made first grant to KIPP

**2001**

Building Excellent Schools launches

**2005**

Made first grant to Charter School Growth Fund to support the growth of high-quality public charter schools to serve 300,000 students by 2026

**2006**

Launched the Charter Startup Grant Program

**2009**

Made first grant to a school district – Denver Public Schools – to support high-quality school growth

**2012**

Made startup grants to 226 schools, the most in a single year to date

**2015**

Launched five-year strategic plan focused on growing high-quality public charter, district and private schools

**2017**

Created the Innovative Schools Pilot

# The Need: More Quality Schools Across States, Cities and Sectors

Despite many important signs of progress, America's educational challenges today remain both urgent and formidable. Nationally, too many students are completing school without the knowledge and skills they need to succeed in college, careers and life. Less than half of high school students are college-ready,<sup>xii</sup> and about one in five of all first-year undergraduates must take a remedial course when they get to college.<sup>xiii</sup>

Racial and socioeconomic opportunity gaps persist. Students from families in the bottom income quartile represent just 10 percent of all students who obtain a bachelor's degree by age 24.<sup>xiv</sup> And they are five times less likely to obtain a bachelor's degree by this age than their higher-income peers.<sup>xv</sup>

It's not just college-bound students who struggle: A lack of job-oriented "middle skills" keeps many young Americans unemployed, even as good middle-class jobs remain unfilled.<sup>xvi</sup> Less than 15 percent of high school graduates finish a full career-prep curriculum in high school.<sup>xvii</sup> Students with greater exposure to career and technical education are more likely to graduate from high school, enroll in a two-year college, be employed and earn higher wages.<sup>xviii</sup>

This reality is unacceptable, and parents know it. Parents in Washington, D.C., for example, are willing to travel about seven miles to send their child to a school with the highest state rating compared to a school with the lowest state rating.<sup>xix</sup> A survey of nationally representative parents in the United States found that over 70 percent favored having a charter school open in their neighborhood as a source of new and better options.<sup>xx</sup>



"Attending an urban, high-quality charter school can have **transformative effects** on individual students' lives."

*Source: Teachers College, Columbia University*



**Nearly 80 percent of parents** support allowing parents to choose their child's public school, regardless of where they live.

*Source: National Alliance for Public Charter Schools*



Compared to their peers in traditional district schools, students in public urban charter schools gain **40 additional days of learning in math** per year and **28 additional days in reading**.

*Source: Center for Research on Education Outcomes, Stanford University*



Charter school alumni from who attended schools at networks like **KIPP, Green Dot Public Schools and Uncommon Schools**—primarily located in low-income communities—are graduating college at **rates many times higher than the national average** for comparable students.<sup>xxiii</sup>

*Source: The 74 Million*



## GRANTEE SPOTLIGHT

### Demanding More: Amplifying Parent Voice in Education and Community

When parents are involved in their child's education, the results are clear. Benefits of parental involvement extend beyond their own household — engaged parents can positively impact schools and communities. Yet parents are rarely brought into schools in ways that tap into their power and wisdom. "Parents are the soldiers on the ground," says D.C. parent Tara Brown. "We have insight you may not have, but we're also caught up in the business of being parents and providers."

The Walton Family Foundation supports efforts to engage and elevate parents in the discussion about how best to create high-quality schools that meet the needs of their children and community.

In Washington, D.C., public charter schools educate close to 50 percent of public school students,<sup>x</sup> but even these families are often unaware of, and absent from, conversations about policies that affect their educational options.

A few years ago, fifth-generation D.C. resident Maya Martin decided to take action. She recalls attending city meetings while running a local charter school where "I was often the only black woman in the room," says Maya. She realized that "until we engaged black mothers and parents in the system, we would be creating schools for them, not with them."

In 2016, Maya founded Parents Amplifying Voices in Education (PAVE), an organization dedicated to informing and connecting parents to the issues that affect their children. PAVE also helps create space for parents to advocate — not just for their individual child but for all children.

Over the last two years, PAVE has recruited an all-parent governing board and engaged nearly 500 D.C. parents

through events and workshops, teaching them how to blog about education, testify before city and state agencies and more. These skills were particularly useful last year when PAVE partnered with D.C.-based Friends of Choice in Urban Schools, to create a solution for the lack of quality options on the eastern side of the Anacostia River, where students often had to travel across the entire city to attend school. Together, PAVE and FOCUS selected eight parents and community members from Ward 8 who became the Parent Operator Selection Team, which surveyed local families about their priorities, created a Request for Proposals, vetted applicants and visited finalists.

Ultimately, the Ward 8 POST recommended that Chicago-based network LEARN Charter School Network open a school on land next to Joint Base Anacostia-Bolling. With experience operating a campus for military families, Tara says LEARN was best equipped to work with children from low-income communities and children of military parents, who move often and experience disruptions in the home, similar to the trauma that affects many students in poverty. LEARN is now finalizing a charter application to open a PreK-8 school on the military base in fall 2019.

"Nobody ever asks our opinion before the process starts, they usually just tell us the result and we deal with it," says Ward 8 POST board member Tara, who has a child in fifth grade at Ward 8's Leckie Elementary. By providing expertise, meals and child care, Tara says the first-of-its-kind Ward 8 POST that PAVE and FOCUS convened "made us feel like our opinion was valued and created a safe space for us to go for our dreams."

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**Studies of student outcomes make it clear that many public charter schools have a positive impact on student learning. In particular, most urban charter schools are better preparing students for a lifetime of opportunity.<sup>xxi</sup> These schools are serving as a lever for community growth and development while also contributing to extraordinarily positive learning and life outcomes for children.<sup>xxii</sup>**

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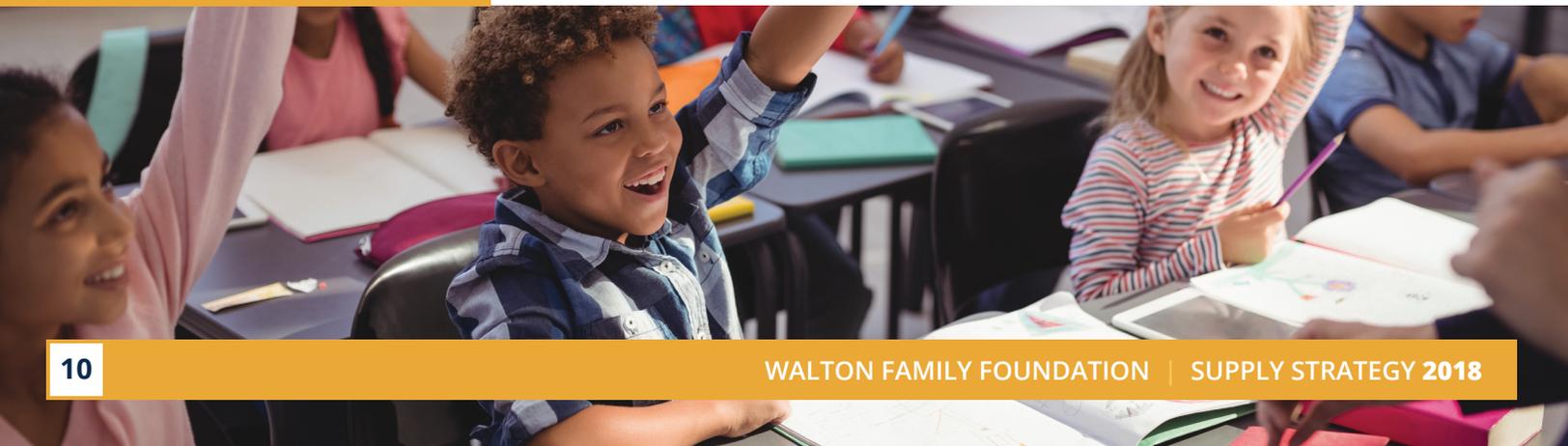
The best public charter schools, primarily located in low-income communities, are closing the achievement gap and preparing students to graduate from college at three to five times the national average for students from the lowest family income quartile.<sup>xxiv</sup> They are also having positive effects on other crucial outcomes, lessening the likelihood that students will use drugs and alcohol and reducing their likelihood of incarceration.<sup>xxv</sup> And a recent study in New York City found that student achievement increased at traditional district schools near public charter schools, and that the closer the charter school, the larger the effects.<sup>xxvi</sup>

Because parents see the incredible possibilities of these autonomous, innovative public schools and seek enrollment for their children, demand now exceeds supply. Nationally, more than one million children are on waiting lists to attend the public charter school of their choice.<sup>xxvii</sup> In 2016, over 44,000 students were on waiting lists in New York City;<sup>xxviii</sup> in 2017, 32,000 students were on waiting lists in Massachusetts and in 2018, D.C.'s charter school waiting list grew by over 16 percent.<sup>xxix</sup> When cities like Indianapolis and Denver create common application or unified enrollment systems to make it easier for families to find and enroll their children in public charter schools, applications defy expectations<sup>xxx</sup> and parent difficulties with the application process decrease.<sup>xxxi</sup>

**Behind this sobering data are untold multitudes of stories of unrealized potential and access denied.**

**And while this problem is acute in our cities, it reverberates far beyond the urban core. Outside of cities — in suburbs, small towns and beyond — parents are demanding schools that work for their children.<sup>xxxii</sup>**

This makes it imperative that we look to and learn from the thousands of educators and schools across the nation that are successfully preparing their students for success in college, career and beyond. Some are public charter schools, certainly, but others are run by districts, nonprofits and private operators. We will continue to support the development of more high-quality public charter schools, while also working to open other types of schools, such as innovative district and effective private schools, for the students who need them.





# Our Approach: More Good Schools of Many Kinds

To meet the evolving needs of today's students and ensure every child in every community can access a high-quality school, the Walton Family Foundation will continue and grow its school startup support in the years ahead. We will fuel the growth of great public charter schools as well as new routes to excellent school creation — public charter, district and private. We will work alongside other philanthropic partners to grow impact. And we will partner with organizations that advocate for strong public policies that enable high-quality public school growth.

One vital element of our strategy is starting and growing high-quality schools within target cities — and we'll make even more of these investments, and at even earlier stages, breaking down barriers that keep educators, emerging entrepreneurs and leaders of color from founding new schools. We will seed more schools that intentionally serve students of diverse backgrounds. We will support more schools that tap into entirely new ways of educating students, especially those who are most academically at risk and who are often underserved by traditional one-size-fits-all models. We will ask more educators to create and lead these schools, which will also include autonomous district schools and private schools that are preparing students for success.

Ultimately, we anticipate that these schools — and others that work with and learn from them — will prepare more students to thrive in high school and college, take ownership of their learning, thrive in their careers and participate fully in social and civic life.

## Starting and scaling more proven high-quality public charter schools

Proven charter school models are changing the life trajectories of children, helping students persist through, and graduate from, high school and college. These schools are contributing to higher career earnings.<sup>xxxiii</sup> We are committed to continuing and even increasing our support for these schools. But we are also enthusiastic about the development of new types of public charter schools.

Indeed, we believe there is unmet opportunity, with innovators developing new models that can serve students well and meet overwhelming demand. We plan to make more capital available to these entrepreneurial educators earlier in the process of designing new visions for schooling and preparing for a strong start. This includes removing one of the biggest barriers to high-quality charter school growth — the process of finding and financing facilities — through the Foundation's Building Equity Initiative.



## GRANTEE SPOTLIGHT

### More of a Good Thing: Intermediaries Help Educators Create Vibrant Charter Networks

In 2001 near the Texas border with Mexico, educators Tom Torkelson and Joann Gama opened a new college preparatory school for students who were primarily Hispanic and from low-income communities. Within just a few years, the students began to outperform their peers statewide.

This was the birth of IDEA, which now operates 61 schools in six regions that serve nearly 36,000 students, one-third of whom are English language learners. Despite this rapid growth, IDEA students outperform their statewide peers nearly every year. Nearly every single IDEA graduate enrolls in college and about 35 percent of alumni earn college degrees — more than three times the national average for students from low-income communities.<sup>xli</sup>

This kind of success is exactly what intermediaries like Charter School Growth Fund dream of when they help founders create and grow new schools into strong school networks. CSGF began supporting IDEA in 2006 when the network served just 1,000 students.<sup>xlii</sup> “Those dollars specifically allow us to do the important back-office work,” says Sam Goessling, IDEA’s chief advancement officer.

The research backs this strategy up: Stanford University’s CREDO research team has found that most schools that start strong stay that way,<sup>xliii</sup> and that “two thirds of (charter management organizations) start new schools that are of the same or slightly better quality as (sic) the existing portfolio.”<sup>xliv</sup> The Walton Family Foundation supports a variety of intermediaries that are growing the field of new schools based on proven models and backing great entrepreneurs as they broaden their impact.

Some of the earliest such intermediaries were Building Excellent Schools, a fellowship that has helped dozens of entrepreneurs launch their first schools, and NewSchools Venture Fund, a Silicon Valley-based philanthropy that in 1998 supported the first nonprofit multi-site charter school network, California’s Aspire Public Schools. More recently, the Foundation joined with other donors to launch Silicon Schools Fund, which backs new personalized learning schools across Northern California.

In 2005, John Walton and other philanthropists launched the Charter School Growth Fund to grow successful schools into larger networks, commonly called charter management organizations. CSGF backs schools that use a range of models and it emphasizes school quality and the leadership team’s capabilities above all else. Since 2005, CSGF has supported charter school networks that now operate 870 schools serving 370,000 students.<sup>xlv</sup> The vast majority of these students are children of color from low-income backgrounds. Two-thirds of the organizations ran just one or two schools when they received their first CSGF investment.

A newer CSGF initiative, the Emerging CMO Fund, has supported more than 20 charter school networks led by entrepreneurs of color. Many of these leaders operate high-performing schools but lack access to capital to expand their impact. The Emerging CMO helps connect them to resources that allow them to open more schools that serve students from backgrounds similar to their own.

“The most successful schools we’ve seen have been those with an idea who validate those assumptions with parents and community partners,” agrees Caitrin Wright of Silicon Schools Fund. In addition to its traditional investments, Silicon Schools enables promising educators of color to learn alongside high-performing charter entrepreneurs as they fine-tune their school models.

Likewise, CSGF’s Emerging CMO Fund dispenses both capital and connections. “Being a charter school leader and founder is lonely — even more so when others around you don’t look like you,” says Darryl Cobb, partner at CSGF and leader of the Emerging CMO Fund. “We help connect these leaders with funding, resources, and mentorship as they open new schools.”

One of the charter school networks receiving support from CSGF’s Emerging CMO Fund is Equitas Academy Charter Schools in Los Angeles. Born and raised in the crowded Pico Union neighborhood, Equitas Founder Malka Borrego was a first-generation college graduate who began a two-year fellowship with Building Excellent Schools after several years of teaching and nonprofit work.

“Building Excellent Schools gave me the brainspace, time and money to understand how other communities had organized effective schools for their students,” says Malka. She has created four K-8 charter schools focused on preparing more than 1,000 students to graduate from four-year colleges and universities. “In Los Angeles Unified School District and Pico Union, the promise of bilingual education has not been fulfilled,” observes Malka.

Malka says the capital and connections from the Emerging CMO Fund and CSGF’s National Fund have helped with everything from facilities to leadership development to helping her decide whether to open a high school. She plans to double the number of Equitas schools to eight, which will eventually serve one-quarter of Pico Union’s K-8 students. Student attrition is far lower than at nearby schools, and while many students enter Equitas as English language learners, most master the language quickly. At Equitas’ flagship campus, Latino students from low-income communities perform as well on standardized tests as their non-low-income Latino peers attending nearby schools.<sup>xlvi</sup>

Indeed, CSGF’s portfolio of organizations and schools is demonstrating that it is possible to start and grow schools that do a better job of meeting students’ needs. Students in CSGF portfolio schools gain the equivalent of 80 additional days learning in math and 57 additional days in reading than similar peers at traditional public schools.<sup>xlvii</sup> The schools have graduated over 41,000 students, and CSGF portfolio students, more than 90 percent of whom are from low-income communities, are more likely than other students from low-income communities to earn a college degree.<sup>xlviii</sup>

At IDEA, parental demand has led the organization to its most ambitious growth plan yet: Adding more than 100 schools and enroll 100,000 students by 2022. In some years and regions, IDEA receives five applications for every available seat in its schools. “Parents want their child to be able to go to a school where they have the opportunity to go to college,” says Jo Ann Gama, co-founder, president, and superintendent of IDEA. “We started with that premise in 2001 and have made it a reality for the past 12 years where 100 percent of our students have been accepted to college.”

### WALTON FAMILY FOUNDATION'S BUILDING EQUITY INITIATIVE

One of the most significant barriers that public charter schools face is identifying and securing facilities. Finding a space where teachers can teach and students can learn is a pre-requisite for nearly every new or expanding public charter school — and something the foundation wants to make easier for school leaders.

The Building Equity Initiative marks the first time philanthropists have tried to catalyze system-wide improvements in how high-performing public charter schools access facilities financing. In 2018, the foundation announced two transformative lending funds that will make it easier and more affordable for high-quality public charter schools to find, secure and renovate facilities:

The Charter Impact Fund is a first-of-its-kind nonprofit revolving loan fund that provides long-term facilities financing and works with partner schools to establish permanent roots and support thousands of students. The CIF provides charter schools with access to lower transaction costs and quicker loan execution, allowing schools to save several million dollars over the loan term.

Created in collaboration with Bank of America Merrill Lynch and managed by Civic Builders, the Facilities Investment Fund is an innovative private-philanthropic partnership to drive down costs associated with finding and securing facilities. The FIF is available to single-site schools or public charter management organizations for new construction or site renovations.

# More diverse and innovative approaches to educating students

In order to truly prepare all students for success in the 21<sup>st</sup> century, with its global interconnections and rapidly changing economic demands, we know that school structures and designs must change. Increasingly, current and future generations of students will achieve success not through a fixed set of skills, but through the ability to adapt, learn new skills, work together and lead.

We believe it is essential to support many more innovative school models, especially those that truly look and feel different than today's schools. These schools must be held accountable for rigorous preparation of students for college and career, and they must serve special student populations, including those with persistent and unaddressed challenges.



“Schools have to prepare students for jobs that have not yet been created, technologies that have not yet been invented and problems that we don’t yet know will arise,” says Andreas Schleicher, director of education and skills for the Organisation for Economic Co-operation and Development. “Education today is much more about ways of thinking which involve creative and critical approaches to problem-solving and decision-making. It is also about ways of working, including communication and collaboration, as well as the tools they require.”



Related to other countries, **the United States ranks ninth** in its preparations for smoothly integrating intelligent automation into its economies. As automation increases, repetitive and rote jobs will make way for roles requiring adaptation and critical thinking – and **stronger education.**

*Source: The Automation Readiness Index*

## INNOVATIVE SCHOOLS PILOT

To identify the newest and most exciting school models and leaders, the Walton Family Foundation launched the Innovative Schools Pilot in 2018. This program is designed to support schools that look and feel truly different, set the bar high for educational outcomes, serve high-need students and embrace analysis of their successes and challenges to share with other schools.



## GRANTEE SPOTLIGHT

### A New Twist on an Old Individualized Learning Model: Modern Montessori Models Gain Ground

"If you were going to start over with a sheet of paper and no context, what would you think your children should do all day?" asks Wildflower Schools CEO Matt Kramer. "You'd want an environment that would prepare them to be the best version of themselves. And you'd love for teachers to be as fully engaged in this as parents were, like owners of their schools rather than employees."

Wildflower is a Montessori school. Although the Montessori approach has been around for decades in preschool and private schools, it is gaining ground as an umbrella for innovative approaches for individualized public education. That's why the Walton Family Foundation is supporting Wildflower and other Montessori models as part of its efforts to foster diverse educational approaches that meet the needs of every child.

Designed to grow independent learners through self-directed, hands-on work, Montessori schools address the whole child, building autonomy and even courtesy along with academic competence. Research on Montessori's impact has been promising: A recent South Carolina study saw more growth in math, social studies, and general creativity among Montessori students than among their peers.<sup>xlix</sup>

Founded in 2014 as a national network of tiny, one-room schools, Wildflower Schools looks very different from traditional or even Montessori schools. Its multi-grade classrooms sit in regular shopfronts, simultaneously saving money on facilities, providing students with an authentic connection to the surrounding community and allowing teachers to run one- or two-classroom schools with minimal overhead.

Wildflower now has 15 schools across Massachusetts, Rhode Island, Minnesota, Kentucky and Puerto Rico as well as a support and coaching network. This network is led by Matt, a Teach for America veteran who grew up in Montessori schools and sends his own children to one. The first Wildflower charter school will launch in Minnesota this fall, and Wildflower schools in Puerto Rico are part of the public district system. While the rest are private schools, they are a viable option for low-income parents both in preschool, where most states offer a variety of early childcare assistance programs, and in later grades in states that offer vouchers for private schools. In other places, Wildflower solicits community development grants or philanthropic support to ensure it can serve a diverse student body.

For example, medical assistant Elizabeth Torres uses early childhood vouchers to send her three small children to Marigold Montessori, a Wildflower school in working-class Haverhill, Massachusetts. As a working parent and former teacher, Elizabeth's other option for childcare in her neighborhood was an in-home daycare, but she knew she wanted more for her children. Her 2-year-old son is learning letters and numbers, while her 4-year-old twin daughters are not only playing with letter sounds but also asking to wash dishes and bake at home.

In Washington D.C., Lee Montessori opened in 2014 to bring the highly personalized Montessori approach to children in low-income communities. Parents have been responsive to the school's focus on both knowledge and interpersonal skills. Founder Chris Pencikowski says interim assessments have showed strong academic growth across demographic groups. The school is also piloting the Minnesota Executive Function Scale, an assessment of soft skills like flexible thinking and self-control.

These skills build a love of learning that Montessori parents see translating into greater confidence and stronger learning over time. At Lee Montessori, first-grade student Denim Cain has flourished, according to her mother Kwiecia. As a high school English teacher, Kwiecia had drilled her daughter on letters and sight words before she began kindergarten last year.

Kwiecia was initially dubious when Denim seemed to lose those words, even as she picked up new skills like ironing, sewing and cleaning up. But by the end of the year, Kwiecia noticed that Denim's reading skills had returned — along with a confidence built from choosing her own work.

"Sight words are short-term, but Montessori builds a longer-term memory and understanding of why things are the way they are," says Kwiecia, who commutes 45 minutes across the city to get Denim to school. "She learned how to read and put letters together not because we were standing over her, but because she spent time with them by choice. That nurtures a real love of learning."

# More than public charter schools: District and private schools embracing accountability and autonomy

To achieve the growth and diversity of options we seek, we cannot view public charter schools as our only path to new school creation. The sizable challenge in urban schools can't be met with any single approach. Every family should be able to access a school that best meets their children's needs.

Fortunately, an increasing number of entrepreneurial district leaders are creating conditions for different types of schools with different governance models to thrive. Dramatic improvements to struggling district schools may be pursued through a district-managed restart or a charter-managed contract. In either case, these schools have the flexibility they need to deliver results for students. In other places, city leaders have created "innovation zones" or other structures that invite educators to open a wide range of new district schools.

In addition, private schools, such as those receiving vouchers, can be part of the solution when they use public dollars and remain accountable for helping students from low-income communities succeed. Over the last several decades, the foundation has supported private schools that meet these criteria and advocacy organizations that seek to strengthen accountability for private schools.

For example, The Drexel Fund is a growing school support organization that will help create private schools to serve 15,000 students from families below 250 percent of the poverty line. These new schools will offer children a rigorous education that builds their character and involves whole families and communities, and the schools will do so sustainably on state funding, with minimal philanthropic support over time.

It is important to seize every available opportunity to get more students into great schools. With these different types of high-quality educational options available, decision-making will rest with those who know students best: educators and parents. This structure not only benefits children, but inspires all schools to better serve all students.

The Foundation will engage district leaders, entrepreneurs and other educators in developing new schools of all types. We will remain open to different pedagogical approaches, organizational structures, and governance types, but hold each school and organization accountable for strong and sustainable student results.





## GRANTEE SPOTLIGHT

### More Schools Meeting More Needs: Indianapolis Builds a Portfolio of Options

Growing up in northeastern Indianapolis, Kayla Owens did well at her neighborhood elementary school. But for Kayla and her mother, Katrina, that wasn't good enough—Kayla needed a greater challenge. Kayla transferred to one of the city's new public charter middle schools, and there, she quickly set her sights even higher after a visit to Purdue University. "She loved the campus and the programs that were offered, so I told her to make sure to keep getting good grades and hopefully we could apply for scholarships," recalls her mother.

Fortunately for Kayla and Katrina, Purdue administrators and business leaders were creating a new high school tailor-made for her ambition. Run by former Goodwill Education Initiatives President Scott Bess, Purdue Polytechnic High School aims to prepare more of Indianapolis' students of color and from low-income communities for admission to Purdue's engineering school, and for careers in science, technology, engineering and math.

Along with a range of other new schools that have launched in Indianapolis over the last 10 years, Purdue Polytechnic receives support from the Walton Family Foundation as part of a communitywide effort to increase families' access to high-quality educational options.

After a year of planning under a fellowship with The Mind Trust, a civic nonprofit that supports Indianapolis' school improvement efforts, Purdue Polytechnic launched this year with 150 ninth-graders. Purdue Polytechnic organizes students' learning around design challenges presented to them by local businesses and organizations, from the Indianapolis Zoo to Subaru.

Like many other American cities, Indianapolis has been on a long journey to deliver a strong education to its students: A decade ago, fewer than half of the district's students graduated from high school on time.

Indianapolis' leaders are tackling this challenge by creating brand-new public charter schools, and giving more autonomy to educators who take up the challenge of improving the city's most persistently struggling schools.

Indianapolis Public Schools Superintendent Dr. Lewis Ferebee worked with then-Mayor Greg Ballard, to enable educators to operate fully autonomous "Innovation Network Schools." These schools are often housed in district buildings, and they operate under performance contracts that require better outcomes for students. "By giving our school leaders the autonomy to implement the creative and innovative ideas they feel best meet the needs of their students," says Dr. Ferebee. "IPS is building an optimal environment to foster achievement and cultivate rewarding opportunities for our students and families."

Most Innovation Network Schools were launched with support from The Mind Trust, which operates three fellowship programs to incubate new charter schools, Innovation

Network schools and other education nonprofits. Over the past decade, the Walton Family Foundation's support for The Mind Trust and Indianapolis Public Schools has fueled the creation of new and redesigned schools.

These efforts have empowered dozens of entrepreneurs to create new educational options for students, including not only nonprofit leaders like Scott Bess, but longtime educators like Mariama Carson. Mariama received a fellowship from The Mind Trust in 2014 to develop a Spanish language program. She spent two years visiting strong immersion programs, even working for a time at an immersion school in Mexico City.

In fall 2016, she launched Global Preparatory Academy at Riverside 44, restarting a district school that had been struggling for years. In her first year, the school surged from an F to an A on the state ranking system for new schools, doubling the percentage of students who passed the state's reading and math tests.

"Going out on my own was a very scary process — I couldn't have done it without The Mind Trust," Mariama reflects. "They helped introduce me to my board of directors and to financial support in the community, and helped put options and possibilities in front of me."

By fall 2018, nearly half of all public school students in Indianapolis Public Schools will be enrolled in an independent charter school or an Innovation Network school. Students in the city's charter schools outperform their peers in traditional district schools in both reading and math.<sup>1</sup> Meanwhile, most Innovation Network schools have increased student learning, with some leaping from an F to an A on the state's measures of performance.<sup>1</sup>

"Some of our biggest accomplishments," says Dr. Ferebee, "include the expansion of high-quality options for families, aggressive intervention in our lowest-performing schools, and replication of our highest-performing programs. We recognize that there is no one-size-fits-all solution to improve student outcomes."

Indeed, for students like Kayla Owens, having stronger school options has been life-changing. Now a freshman at Purdue Polytechnic, Kayla plans on attending Purdue University and becoming a computer engineer. She is gaining both the knowledge and practical skills to get her there.

"Kayla has been exposed to a lot of industry settings she wouldn't have otherwise been exposed to," says her mom, Katrina, who worked her way through four college degrees while raising Kayla. "I'm so grateful that her college preparation is taking her beyond the academics, with the self-management and time management she'll need to schedule courses, get there on time, adhere to deadlines and stay motivated to get the work done on her own."



## GRANTEE SPOTLIGHT

### Infusing Community Into Schooling: Purpose Built Schools Reinvents Support for Atlanta Parents and Students

The Forest Cove public housing apartments in southeast Atlanta, where the city's highest concentration of low-income families lives, is wedged between a federal prison and an old landfill. For decades, the only school option was Thomasville Heights Elementary School, which for years has ranked among the lowest-performing schools in Georgia.

Big changes came when the school district brought in Purpose Built Schools Atlanta to manage Thomasville and three nearby schools in the Carver High School cluster. Purpose Built Schools Atlanta is a network of district partnership schools — from Atlanta Public Schools — that are independently governed. They approach school and community revitalization by working hand-in-hand with teachers, families, and school and community leaders.

Through this approach, Purpose Built and Thomasville educators created a more stable learning environment, and students are learning far more. Student turnover has dropped and Thomasville students earned the third highest gains in achievement scores on the College and Career Ready Performance Index out of all Atlanta Public Schools in 2017.<sup>iii</sup>

By providing rigorous academics, working directly with parents and connecting families with such resources as legal aid and mental health services, Purpose Built has created a strong rapport with parents and produced better outcomes for children. “A lot of people come to our community to help but they don’t know where to begin,” says Kimberly Dukes, a parent of six children attending school at Purpose Built campuses. Kimberly, now a family and community outreach coordinator at Thomasville Heights, explains that in contrast, “Purpose Built sat down and talked to a lot of parents to find out what were the concerns in the neighborhood and brought in the resources we needed.”

The Walton Family Foundation has been supporting Purpose Built’s growth and community engagement work, which is modeled on the approach at neighboring Drew Charter School, itself seen as an anchor of holistic community revitalization in Atlanta’s East Lake area. Using the same buildings and teaching the same students that the school district had before, Purpose Built gets

results by doing things differently, such as hiring new teachers, adding engaging learning projects, and helping students catch up through tutoring and other after-school programs.

To really turn things around, in-school academics must be paired with supports for families. “In order to have lasting gains on students and communities, we have to address what happens outside the classroom as well, including stabilizing efforts for families and revitalization for communities,” says Christina Perry, Purpose Built’s chief community officer. Purpose Built’s team of community outreach coordinators works within and across its schools, asking families for input and feedback while addressing nonacademic concerns. Purpose Built has also hired 30 parents across the Carver school cluster through a Parents as Leaders program that aims to build their professional skills.

Purpose Built’s community engagement team also partners with local nonprofits like mental health services provider CHRIS 180, which places full-time therapists at each school site, and the Atlanta Volunteer Lawyers Foundation, which helps families manage housing concerns so students can focus on learning.

AVLF staff members Ayanna Jones-Lightsy and Christal Reynolds have offices inside Thomasville Heights, but they also visit nearby apartments and local businesses to meet families where they are. “We can see what is happening in the lives of students behind the scenes, outside of school,” says Christal. “We’re here to act as advocates to help families fight displacement, so they can get the benefit of a community that’s surrounding them,” adds Ayanna.

With such a supportive team in place, educators at Purpose Built are able to focus on students’ academic needs and put parents’ minds at ease. “Just to know you have people in place who care about your community and about your children and who listen to you, there’s just a big weight lifted off your shoulders because education is the most important thing,” says Thomasville parent Kimberly. “There is always someone here to help you as a parent to grow with your children to make sure they have everything they need.”

## More early-stage support for teachers and leaders of color

To realize the vision of an excellent school for every child, a larger percentage of the teachers and leaders at both the school and system level must be representative of the communities they serve, in part because of powerful evidence of the impact teachers of color can have on students from similar backgrounds.<sup>xxxiv</sup>

We will therefore seek to make it easier for seasoned leaders and first-time teachers and entrepreneurs of color to enter the classroom and launch and scale schools. This means we will increase support for school incubators, leadership development programs and other initiatives that help first-time educators and leaders of color lead classrooms and schools for the students and communities that need them.

We will also more broadly support new entry points to the leadership pipeline through partnerships with universities, fellowships and innovative approaches to professional advancement.



Having just one **African-American teacher in third, fourth or fifth grade** reduces the probability that low-income African American boys will drop out of high school by **39 percent**. In high school, African-American students who had at least one African-American teacher have much stronger expectations of going to college.

*Source: Institute of Labor Economics*

## Navigating the transition from secondary to postsecondary and beyond

Although an increasing number of K-12 schools are sending more students to college, many students struggle once they arrive there. The challenges vary and often mount: mastering new academic subjects with inadequate support, navigating an unfamiliar system as a first-generation college student, developing and living within a financial plan throughout the college experience. There are wide disparities in college degree attainment among students from lower- and higher-income communities across the country,<sup>xxxv</sup> including those who graduate from high-performing charter schools.

For those who choose paths other than college, the challenges likewise can be overwhelming. Nearly all net new jobs created since the recent recession have gone to workers with at least some college education,<sup>xxxvi</sup> and the process of securing a living wage — let alone a career they can sustain throughout their lives and upon which they can support a family — can be extraordinarily difficult.

To address these challenges, the foundation is actively seeking schools and programs taking new approaches to helping students obtain the requisite skills to overcome the barriers they confront on the pathway to a college degree or thriving career.



## GRANTEE SPOTLIGHT

### Creating More Pathways, Fostering Stronger Leadership: Supporting Diverse and Early-Stage Educators and Entrepreneurs

In order to address the varied needs of students and communities, we must nurture more ideas from more leaders, starting in their earliest stages.

That's why the Walton Family Foundation invests in several "intermediary" organizations skilled at supporting promising entrepreneurs. Among these are 4.0 Schools, Reframe Labs and the Emerging CMO Fund at the Charter School Growth Fund. These organizations and programs help innovators and organization-builders refine their focus and skills, and prepare them to open strong new schools and education organizations.

For example, 4.0 Schools offers "Tiny Fellowships" that "give more people a better shot at building the future of school in their community," says 4.0's interim CEO Hassan Hassan. "The best ideas are going to come from a group of people who are as diverse and representative of our communities as possible."

Tiny Fellowships offer a little capital and a lot of guidance as participants flesh out their ideas to help more children access a high-quality education. Among the innovators are many who might not have otherwise taken the leap into entrepreneurship. "Fellows can test ideas, get feedback from the people they want to serve, iterate the process, grow a little bit and repeat," says Raphael Gang, 4.0's director of pathways. "So, when fellows are ready to quit their day jobs, they already have validation and a built skillset."

For example, first-generation college graduate and teacher Jonathan Johnson last year opened Rooted School in New Orleans. Jonathan was inspired to do more when Ricky, his successful former student was murdered. "Even closing the achievement gap for Ricky wasn't enough to address the cumulative effects of poverty," says Jonathan. "We have to broaden the pathways of what success can look like for these students."

Jonathan used the capital he received as a 4.0 Schools fellow to prototype his curriculum at a local public charter school. That gave him a strong foundation when opening Rooted, which now enrolls 40 ninth-graders and will grow to serve even more students in the years to come. Uniquely, Rooted connects companies in need of qualified interns and employees with high school students who need real income and employment prospects. More than half of students will have at least one employer-validated credential and a handful will even participate in paid internships by the end of their ninth grade year. Jonathan plans to open a second school in Indianapolis in the coming years.

More recently, 4.0 Tiny Fellow Kennan Scott parlayed his experience teaching computer science at West Oakland Middle School into a new program called CODEd Academy. CODEd embeds computer science in other subjects to deepen instruction and engage students. "Teachers were excited to add computer science to their classes as a way to meet students where they are and to give them an outlet to show what they know in a way that's really comfortable and fun," says Kennan. "Our classroom became a design studio, a place we could implement soft skills. We would start with team meetings, discuss our projects, ask for help and really built this awesome community."

Kennan says working alongside other founders in the Tiny Fellowship "pushed my thinking and challenged my idea in a productive and supportive way." He adds: "This was the first time that I felt that I had support from a community that's trying to make education better." Kennan piloted his program last summer for three weeks: student achievement in math grew 70 percent,<sup>iii</sup> and all parents (and nearly all the students) said they would recommend the camp to others.

Similar to 4.0 Schools, Reframe Labs focuses on fostering innovative new school models in Los Angeles County, guided by the belief that local know-how is essential to support leaders from idea to school launch. Reframe, launched in 2015, vertically integrates leadership development, school model design and local policy navigation. Reframe fellows, 94 percent of whom are people of color or women, will launch 10 new public schools by the fall of 2020.

Founder Russ Altenburg noticed that many school development programs based significant funding decisions on a traditional application-and-interview process that yielded limited information and insight into a candidate's entrepreneurial mindset and "commitment to the marathon," leading to inconsistent results. "That type of process uncovers people who have a vision and who are good at telling their story-of-self and using the right buzzwords, but you can't be sure whether or not they are doers who can manage the scrappy work of launching a school," he says.

Through a series of design "sprints" and performance tasks that increase in depth and length, Reframe provides initial training. The strongest leaders who focus on co-designing school models that are rooted in meeting community need are invited back.

Reframe also uses data to show participants which neighborhoods lack strong school options despite public charter school growth. "We shouldn't design schools in a vacuum — we should be designing our schools around the needs of a community," says Russ. "We need to give those families better and more choices."

Only the most promising leaders make it into Reframe's two-year fellowship, which includes \$50,000 in support and

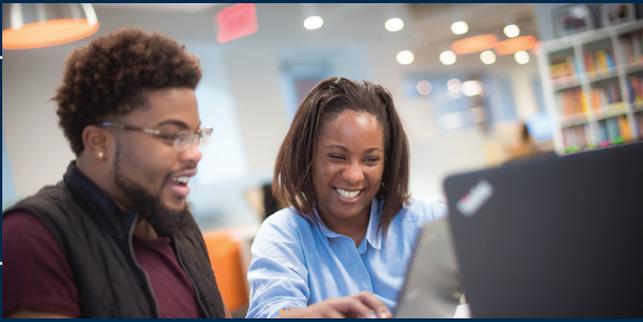
more than 400 hours of coaching and connections that emphasize the practicalities of schooling in Los Angeles. The first leader in Reframe's fellowship is Anita Ravi, who hopes to open We the People Public School in fall, 2019. Living in city of Long Beach, which has been praised for its academic performance, longtime social studies educator Ravi was dissatisfied with her daughter's options for high school — and even more dismayed to watch students of color and students from low-income communities tracked away from college preparation.

"The real disconnect is that kids are asked to check their identities at the door, fall in line, and learn school subjects," reflects Anita. "We are designing our school so that students have the opportunity to learn about and work on the problems and issues they care about. Students have ideas about how to make their communities better, and school should be the place where they learn the skills to make these changes." We the People will use the United Nations' Global Goals for Sustainable Development as a roadmap for students' learning, along with real-world projects and apprenticeships with nonprofits, government agencies and businesses.

During Reframe's Beta Lab, Ravi participated in equity- and innovation-themed design activities, ultimately creating her mission, vision, brochure and a pitch for prospective parents. Last summer, as part of the Delta Lab, she hosted a five-day "pop-up" school pilot that helped her deepen local relationships and refine her model for the charter petition she submitted this spring.

Soon, Ravi hopes to find a building that will house a new kind of high school — with ripple effects throughout the area. "This school is about establishing a set of kids who are going to ensure that our government, our international communities, and our planet will survive," she says.





## GRANTEE SPOTLIGHT

### A Matter of Degrees: Innovative Programs Usher More Students To and Through College

Jalen Epps' parents always wanted a great school for their son. They enrolled Jalen in first grade through a voluntary Massachusetts program to expand opportunity through diversity, and Jalen soon found himself attending a public school in Sharon, an affluent suburb near Boston. Jalen's parents believed that a better school would lead to a degree from a good college and solid job. For a while, the plan worked — until Jalen enrolled in that good college.

Jalen nearly slipped off that track after his first year at college. His two part-time jobs, a work-study program and the lure of friends and travel left little time for classes and studying. "I didn't have the time or the want to be learning about A squared plus B squared," admits Jalen.

Fortunately, Jalen found Duet (formerly Match Beyond), a Boston-based college-support program that partners with Southern New Hampshire University to offer flexible and affordable degree programs, as well as start-to-finish college coaching. Duet grew out of the high-performing urban Match Charter Public School in Boston, run by nonprofit Match Education. Now enrolled in Duet's supportive program, Jalen is able to set his own pace and schedule and learn skills that are immediately applicable to his future career.

The Walton Family Foundation partners with innovative programs like Duet that support first-generation, low-income and minority students as they earn college degrees and secure jobs. Today, just one in 10 students who earn bachelor's degrees by age 24 come from low-income families,<sup>lv</sup> and they are five times less likely to obtain a bachelor's degree by this age than their higher-income peers.<sup>lv</sup>

Another such program is KIPP Through College, an initiative from the noted public charter school network. Launched over a decade ago, KIPP Through College is designed to help KIPP high school students select the right college and career path and help alumni navigate the academic, social and financial challenges they might face in college.

"We aspire for our kids to have choice-filled lives and economic self-sufficiency," says Jonathan Cowan, the Chief Research, Data & Innovation Officer at KIPP, who oversees KIPP Through College. "We believe that promises to children are sacred. We view a four-year college degree as the surest stepping stone to get there, while also recognizing we need to build other pathways to help our alumni progress toward lives of choice."

Today, KIPP Through College advisors provide traditional guidance on college matching and financial aid. They encourage students to apply to at least nine colleges, including six "target" or "reach" colleges, where African American and Latino students earn degrees at high rates. KIPP partners with over 90 colleges and universities who share KIPP's commitment to supporting first-generation college students.<sup>lvi</sup>

The work continues after high school graduation — KIPP stays in touch with students over the summer to ensure they show up on the first day. The work continues even when alumni start college — KIPP Through College keeps in contact with alumni during and even after college.

These strategies have helped boost KIPP graduates' college completion rates from 33 percent in 2011 to 38 percent as of fall 2016 (as well as another five percent who earned associates degrees).<sup>lvii</sup> Although KIPP's graduation rate is approximately four times the national average for students from low-income communities, Jonathan says KIPP is aiming higher, with a medium-term goal of helping 50 percent of its alumni earn four-year degrees.

Likewise, about a decade after its founding in 2000, Match Education began to notice that despite their students' stellar college acceptance rates, just over half were earning college degrees in six years or less. "We had put a lot of time and effort into getting these kids through high school, with the idea of [their] finishing college," says Mike Larsson, Duet co-founder and president. Like Jalen, many struggled not only with high tuition but also inflexible class schedules and little support in navigating the competing demands of college life.

In response, Match launched what would later become Duet, enrolling nine of its alumni in the Southern New Hampshire University's College for America (CfA), which offers competency-based programs for students who also work. Duet provides students with a coach to help them navigate the demands of higher education and graduate quicker. "The coach's job is to constantly adjust their methods to meet the students where they are in their life," says Mike. Duet costs just \$6,000 per year — a fraction of the cost of private colleges, state universities and even community colleges, and includes courses through CfA. Many Duet students are also eligible for federal Pell grants that often cover these fees.

Duet has enrolled 250 students from a wide range of Boston-area high schools, with plans to grow to serve 400 students next year. All Duet students have either a high school diploma or GED, and most have tried but struggled with college before. Today, with Duet's support, nearly three-quarters are on track to earn associate's degrees within three years.

Last summer, Jalen became one of 83 students who earned their degree through Duet, finishing his associate's degree while also working full-time at J.P. Morgan Chase. He is now on his way to earning his bachelor's degree in business management, which he hopes will give him a good overview of the financial services industry and earn him a promotion in the next few years.

Jalen credits his Duet coaches, the real-world relevance of CfA's coursework and even the free laptops and food available to him at Duet's offices — where he works on schoolwork most weekday evenings — with giving him the support needed to focus on completing college. "The Duet program works for people who work, but you have to want it," reflects Jalen. "You have to put in the hard work day in and day out, but they'll be there to support you."



## Meeting the unique needs of special student populations

The belief that all students can learn at high levels too often stops short of including students with disabilities. These students, who make up about 13 percent of public school enrollment,<sup>xxxvii</sup> are dramatically underserved by the current system of schools.

Research shows that with the right accommodations and support, the overwhelming majority of these students can meet the same achievement standards as other students.<sup>xxxviii</sup>

To ensure that students with disabilities achieve and attain at the same level as their peers, the foundation will support programs and schools that provide these students with inclusive and rigorous educational environments that adjust for their special needs without encumbering them with low expectations.



“Experts affirm that the vast majority of special education students — **more than 80 percent** — can meet the same academic standards as other students, as long as schools give them the access, accommodations, instruction, and support they need.”

*Source: Innovate Public Schools, An Advocate's Guide to Transforming Special Education*

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## Creating more schools that serve students of diverse backgrounds

We believe it's important to support the creation of intentionally diverse schools. In part, this focus is driven by the need to ensure that our schools mirror our wonderfully diverse society — and part of that is enrolling socioeconomically mixed student populations. It's our belief that all children benefit from the experience of learning in a more diverse environment.

While some of those benefits are subtle, others are concrete and clear. Economic diversity helps break down barriers by class and race and brings children of different backgrounds together so they can learn from one another. Research has found that integrated schools can benefit the whole child, from helping young people challenge their implicit biases to enhancing their creativity, motivation, critical thinking and problem-solving skills.<sup>xxxix</sup>

That's why we will support more schools that recruit students of varied backgrounds, both in and around our target cities. We will also assist programs that train the next generation of educators and leaders to operate mixed-income schools and encourage research to better understand the practices that contribute to student success. This will build on our research and school supply investments made to date.

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In 2017, we pledged **\$2.2 million** to increase access to intentionally diverse public schools for **2,400 students** in New York City.



## GRANTEE SPOTLIGHT

### Innovative Programs Deliver Responsive Solutions to Students with Special Needs

Research shows that the vast majority of students with special needs can achieve at the same level of other students, with the right supports.<sup>lviii</sup> But the painful reality is that for too many students, those supports are lacking — leading students to struggle and families to make tough choices, like educating their children at home.

The New Orleans Therapeutic Day Program offers a powerful example of what better can look like — and of the kind of work the Walton Family Foundation is supporting in the effort to improve services to students with special needs.

In New Orleans, Hurricane Katrina had a devastating effect on family stress levels and the systems designed to care for mental health needs. Children in New Orleans are nearly five times as likely as their peers nationwide to show signs of serious emotional disturbance.<sup>lix</sup> “It’s hard to address traumatized kids because on the surface they can look unmotivated, like they don’t care and are choosing this behavior,” says Therapeutic Day co-founder and clinical psychologist Monica Stevens. “But at the end of the day it comes down to a mindset change — for both the educators and for the students about what they’re capable of.”

Therapeutic Day is designed as a short-term intervention for students with serious behavioral challenges, with the goal of helping students return to their neighborhood school within the school year by combining intensive mental health treatment with academic instruction. Most of the program’s students make a full year’s worth of academic gains in less than six months at Therapeutic Day, says Monica.

For example, Leslie Johnson’s son was one of Therapeutic Day’s first students. Diagnosed with bipolar disorder, he had trouble focusing at his old school. Leslie enrolled her son in Therapeutic Day and within a year’s time, her son made academic and emotional strides thanks to the combination of small groups, home visits and staff who understood his needs. After a year, he rejoined his original school and is now preparing to enter high school.

“We believe kids want to do well, and will do well, if they have the skills to do well,” says Therapeutic Day executive director Elizabeth Marcell. “So we focus on addressing those underlying skill deficits and any psychiatric issues they have.”

Unfortunately, students with special needs are often misunderstood. A lack of understanding about students with developmental and mental health needs leads many such students to achieve well below their grade

level, putting them at risk of not completing high school and struggling with postsecondary opportunities like college and career. However, research shows that the overwhelming majority of these students can meet the same standards if given the right supports.<sup>lx</sup> The Walton Family Foundation supports programs like Therapeutic Day and inclusive schools like Westside Innovative School House (WISH) Charter School that enroll students with mild, moderate and severe needs within the same classrooms as more typically developing students.

Located in Los Angeles, WISH Charter School offers an inclusive education that benefits both students with special needs and general education students. Based on the successful inclusive CHIME Charter School in suburban Woodland Hills, WISH serves a wide range of ability levels in grades K-12. “When we raise these little ones together in classrooms that value all people, we teach kids to care for and support and value diversity,” says WISH founder and principal Shawna Draxton, who previously worked at CHIME. “We expect our classrooms to be a microcosm of society. It’s really important to us that we don’t marginalize or separate folks due to ability.”

At WISH, students of different ability levels stay together throughout the day. Special education and general education teachers “co-teach” classes, and specialists come in to support students throughout the day.

This model benefits all students. Parent Ivey Steinberg sent her son Jack — who lives with a condition called optic nerve hypoplasia that causes vision and speech impairments — to several other schools that struggled to accommodate his needs, which include several specialized devices to help Jack move and communicate. Ivey enrolled Jack at WISH beginning in second grade and watched his school experience drastically improve — so much so that Ivey later helped WISH expand to serve middle and high school students.

Because WISH accommodates Jack’s needs alongside other students, Ivey says her ninth grade son is now a star student, particularly in math. “Here’s this kid who uses a wheelchair and who people may suppose is not as bright because his articulation isn’t as good as his peers, but nobody ever questions whether or not he can do the work,” she explains. “They don’t shine a spotlight on his disability, he’s one of the gang.”



## GRANTEE SPOTLIGHT

### “Bringing Us Together”: Valor Collegiate Draws on Diversity to Develop Strong Students

Near the heart of Nashville — one of the country's most segregated cities<sup>lxii</sup> — sit public schools where students of all background happily intermingle, by design.

Unlike nearby urban schools with largely homogeneous student populations, Valor Collegiate Academies has sought, and achieved, a student population that is intentionally diverse by both income and race. Currently, Valor scholars are eight percent Asian, 15 percent Hispanic/Latino, 17 percent African American, 20 percent Middle Eastern/North African and 40 percent white. Half of students qualify for free or reduced lunch.<sup>lxiii</sup>

Valor operates two of the more than 100 intentionally diverse schools across the country, according to the Diverse Charter Schools Coalition, another foundation grantee that is working to strengthen and create more socioeconomically and demographically diverse schools. Students who attend mixed-income schools have higher test scores, are more likely to enroll in college and are less likely than peers in schools with similar poverty levels to drop out of college.<sup>lxiii</sup> “They gain valuable experience thinking in terms of ‘we’ instead of ‘us’ and ‘them,’” says Sonia Park, executive director of the Coalition. “They’re better prepared to live in, work in and contribute to the multicultural, polyglot world.”

Valor’s diversity attracts a wide range of parents and students to the school. Fearful of what she calls the “pervasive discrimination” she’d witnessed growing up in east Tennessee, parent and professor Brandi Kellett was eager to raise her children (three of whom are white and one of whom is multi-racial) in the diverse, urban 12 South area. “We wanted our kids to be in schools that reflect our city’s makeup, but there are not a ton of schools in Nashville that offer that,” says Brandi.

When her neighborhood began to gentrify, she enrolled her two oldest children at Valor Flagship Academy in 2015. Today, they are blossoming as sixth and eighth graders. Valor’s teachers challenge Brandi’s children to work at high levels and overcome their unconscious biases. “This is not just diversity with a bunch of different people in a room, it’s diversity with a bunch of different people in a room who are taught about how to hold and learn about their bias and question it,” says Brandi. “If I could design a school, I couldn’t create anything better.”

Meanwhile, second generation Somali-Americans Zain and Ismael Ahmed commute to Valor Voyager Academy from the West Nashville area. After attending private K-8 school, their mother Fatima — who grew up attending local public high schools — was not interested in sending them down the same path. “Valor not only had a good academic program, but it felt safe, with teachers and staff that know kids individually,” says Fatima. “My sons are so willing to correct their mistakes, and more motivated than ever.”

Valor Collegiate was founded by educator Todd Dickson, who was dismayed to watch his peers tracked into different pathways based on their performance and race at his own Colorado high school. While working at Summit Public Schools in California, Todd was recruited to Nashville by then-Mayor Karl Dean. Todd believed the Metro Nashville School District offered a chance for real socioeconomic integration by drawing from schools in both the city and surrounding suburbs.

However, simply enrolling a diverse student body isn’t enough, Todd learned. “At our schools, students are learning to reach across boundaries and learn from one another,” he notes. Valor’s social-emotional curriculum, dubbed “Compass,” teaches students to reflect on their own identity and work to understand others’ identities as well. With support from the Walton Family Foundation and others, Valor will share Compass with other schools locally and nationwide.

Valor combines this learning with rigorous academics. African-American 7th grader Saniah Middlebrooks came to Valor Voyager from her neighborhood elementary school, which her father felt was mediocre. “As a youth sports coach, I try to get my kids not only prepared for the game but also for the next level, and her [elementary school] teachers should have done the same thing,” says Terrance Middlebrooks. “Valor gives these kids a desire to want to learn more and do better.”

Focusing on diversity and rigor has helped Valor “invert” the achievement gap. Valor students from low-income communities outperform their more advantaged peers statewide.<sup>lxiv</sup>

Valor plans to open a high school this fall, and will nearly double to serve 1,750 students by 2022. Terrance looks forward to watching his daughter extend her diverse friendships and reflective learning into high school. “Racism and segregation are learned behavior,” says Terrance. “In so many places, kids are taught how to separate, but Valor is bringing us together.”



# Entering the next chapter, with optimism

As the Walton Family Foundation moves ahead, we are excited to expand resources for educators, leaders, parents and communities that create new school models and visions to meet the myriad learning needs of today's children. We will increase our support for unique school models and recruit more leaders of color to start, grow and lead great schools.

This future growth is rooted in more than two decades of startup experience, partnering with and supporting passionate and talented educators who want to make school better for children. Over that time, we've narrowed our focus on cities and growing proven models. What comes next, we surmise, is a continued emphasis on scaling what we know works in parallel with a passionate pursuit of next-generation ideas — the new and novel concepts of school that are as compelling today as KIPP was in 1995.

Still, new schools and models are not our ultimate objective. The end we seek is better outcomes for the next generation of young people: better possibilities, better opportunities and a brighter tomorrow. We will measure our impact not by the number of schools we help, but by the number of children who achieve a better life. Decades of progress have shown us, and the country, what's possible. We're clear-eyed about the challenge ahead — and look forward to supporting those who are stepping up to lead the way to a brighter future.

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