Social, Emotional, and Academic Development Field Landscape Analysis: Webinar

October 2nd, 2018
Landscape Analysis Webinar Agenda

Welcome and introductions

Landscape Analysis approach and methodology

Synthesis of Landscape Analysis components

Use of Landscape Analysis and next steps
Welcome and introductions

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Context and plan for today's discussion

This Landscape Analysis was conducted from April-July 2018 by The Boston Consulting Group in support of the National Commission, in partnership with Grantmakers for Thriving Youth. The analysis is a summary of existing field capacity to lead and sustain implementation of social, emotional, and academic development-related practices like those in the draft recommendations of the National Commission.

The purpose of this exercise was both to inform the work of the National Commission and to create a resource for the field that provides knowledge about the social, emotional, and academic development space and can support organizations' strategic decision-making.

Today we aim to accomplish two broad objectives:

- Introduce the Landscape Analysis's contents so that you can leverage it most effectively within your organization.
- Share high level learnings from this analysis and answer questions on its findings.
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Contents of Landscape Analysis

1. Existing landscape / field capacity
   - What are the key segments, and who are the major players in each?
   - What is the capacity of field actors? Where are opps to build capacity?
   - 7 page synthesis of field capacity with detailed chapters on 14 implementation levers and 70+ opportunities identified for field
   - 188 page narrative (PPT)

2. Lessons learned
   - What lessons can be learned from prior large-scale change efforts?
   - 5 prior movements evaluated, 3 page synthesis with deep dives on lessons from each change effort included

3. Relational map of field actors
   - Who are the main actors that characterize the field?
   - How are these organizations related to one another?
   - Organizational database for relational mapping (XLS)
   - 42 page relational map companion deck, including findings and instructions for use of TouchGraph navigator tool

4. Perspectives and frames
   - What are the existing frames that characterize the field and how do they relate to each other?
Primary inputs to the Landscape Analysis

Existing market analyses and reports
- Review and synthesis of several reports and publications related to field

Stakeholder interviews across Commission and partners
- Completion of ~100 interviews including with non-affiliated organizations

Information on philanthropic giving
- Analysis of funder data submitted across several funders' collaboratives

Web page analysis of partners and funders
- Review of field actors for partner or funder relationships as mentioned on websites

1. 16 Grantmakers for Thriving Youth (GTY), Funders’ Collaborative for Innovative Measurement (FCIM), and NC SEAD affiliated funders
What the Landscape Analysis narrative can and cannot say about the current state of field capacity

Captured within Landscape Analysis on current state of field

- Description, topic coverage and in some cases reach of existing programs and approaches, based on interviews and publicly-available data
- Demand for and quality of select approaches, based on existing reports and interview input
- Footprint of recent relevant philanthropic investments, based on data provided by 16 funders
- A narrative on field capacity that weaves together the above sources with the opinions of a diverse array of informed stakeholders, as captured in interviews

Not captured within Landscape Analysis on current state of field

- The total number of actors in the field or a specific part of the field
- The reach of all actors highlighted
- The quality and impact of specific programs / approaches against an objective rubric
- The current state of implementation across U.S. practitioners including schools, districts, and out-of-school time (OST) settings (except as described in existing studies)
Landscape Analysis narrative framed around ~14 implementation levers

School & program design models, curriculum, and other tools

Continuous improvement systems, measurement and frameworks

Technical assistance

Networks

Pre-service training

In-service training

School and OST program design models, curriculum, and other tools including curriculum aggregators and evaluators

Systems and tools for measurement, research

Technical assistance providers

Place-based and cross-geography networks

Leadership and development preparation programs, including both traditional and alternative

Leadership and educator development in-service programming

Public funding

Federal, state, and local resources

Philanthropic funding

Private, education-oriented philanthropy

Communications, advocacy and engagement

Youth voice and leadership

Local coalition building and campaigns

Social media engagement and educator led-networks

Federal, state, and local advocacy

Aligning and convening the field

National and regional associations

Field-wide convening and existing opportunities for collaboration
Landscape Analysis narrative provides an assessment of field capacity across ~14 implementation levers

<table>
<thead>
<tr>
<th>For each lever, Landscape Analysis includes...</th>
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</thead>
<tbody>
<tr>
<td><strong>Overview</strong></td>
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<tr>
<td>Overview of field capacity within particular lever</td>
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<tr>
<td><strong>Opps. / gaps</strong></td>
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<tr>
<td>Assessment of field momentum including identification of key gaps and opportunities</td>
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<tr>
<td><strong>Impact data</strong></td>
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<tr>
<td>Synthesis of available data on reach of social, emotional, and academic programs or initiatives</td>
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<tr>
<td><strong>Key actors</strong></td>
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<td>Categorization of key field actors with examples of major players across the field</td>
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High-level takeaways from the Landscape Analysis narrative

Strong demand and growing adoption

Need for exemplars and implementation knowledge

Significant field capacity-building opportunities

Need for strengthened field collaboration
Strong demand and growing adoption

Several conditions have contributed to a supportive environment for social, emotional, academic development...

**Policy:** Every Student Succeeds Act (ESSA) providing increased flexibility to states on how to allocate resources and prioritize school time

**Evidence:** Mounting research and evidence on impact of social, emotional practices

**Resonance with educators:** 93% of educators think social, emotional learning is important for school experience, 87% think larger emphasis will improve outcomes

**Available resources:** Increase in curricula, tools and resources to support educators

...leading to increased adoption of social, emotional, and academic-related practices across states, districts, schools and OST programs

<table>
<thead>
<tr>
<th>States</th>
<th>Districts</th>
<th>Schools/OST</th>
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<tr>
<td>40 state applications for ~5 original spots in CASEL’s Collaborating States Initiative (CSI)</td>
<td>Expansion of CASEL’s Collaborating Districts Initiative (CDI) from 8 to 16 districts</td>
<td>Used with 13M children/year</td>
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<tr>
<td>700% increase in states with K-12 social and emotional (SEL) competencies from 2011-2017</td>
<td>CA Core districts use metrics related to student social, emotional learning and school climate</td>
<td>15M+ students have taken assessments related to social and emotional learning including school climate</td>
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<td>Working with out-of-school time (OST) providers to define specific SEL skills</td>
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Source: Ready to Lead (CASEL); The Scale of Our Investment in Social-Emotional Learning (Transforming Education); Developing Life Skills in Children (Learning Heroes/Edge Research); CASEL’s 2018 State Scorecard Scan; Landscape Analysis stakeholder interviews, BCG analysis
Need for exemplars and implementation knowledge

Needs identified in the field

Clear vision of what integrated implementation looks like in context

Understanding of entry points and implementation progression(s) from current state to future vision

Knowledge, skills, mindsets required to implement in a way that facilitates equitable student outcomes

More research-supported measurement tools at all levels

Resulting pitfalls in execution, falling short of the vision articulated in Commission’s recommendations

- District superintendent lauds the widespread use of climate surveys as evidence of integrated approach
- School “does SEL” = ~1hr of teacher mindfulness/month
- OST program asserts it has “always done SEL” but lacks intentionality and focus

- School regularly administers a climate survey but staff do not know how to analyze the data or take action against the challenges that emerge
- District implemented explicit SEL instruction; what next?

- Teachers and OST educators are expected to employ practices without often having received explicit training or supports to unpack conscious and unconscious bias or explore how they may contribute to disproportionate student outcomes

- District lacks tool to assess system-wide implementation
- OST provider lacks ability to measure its impact on child social, emotional competencies in systematic way

Source: Landscape Analysis stakeholder interviews, BCG Analysis
### Significant field capacity-building opportunities

**Example areas of needed capacity across implementation levers**

<table>
<thead>
<tr>
<th>School &amp; program design models, curriculum, and other tools</th>
<th>Continuous improvement systems, measurement and frameworks</th>
<th>Technical assistance (TA)</th>
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<td>Few integrated programs designed for diversity of contexts, e.g., cultures, ages, subject matter, etc.</td>
<td>Improved quality and reliability needed, esp. for use in continuous improvement; approach to accountability is inconsistent with lack of consensus in field</td>
<td>Limited reach of TA providers with expertise in change management; demand exceeds supply</td>
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<td>Limited reach of strongest models</td>
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<th>Place-based networks</th>
<th>Pre-service training</th>
<th>Technical assistance (TA)</th>
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<td>Some emerging place-based networks focused on social, emotional learning, reach is limited; many emerging place-based networks without this focus</td>
<td>Fraction of educators reached through programs that deeply integrate social, emotional content and support adults meaningfully around cultural competence</td>
<td>Limited reach of TA providers with expertise in change management; demand exceeds supply</td>
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<th>Philanthropic funding</th>
<th>Technical assistance (TA)</th>
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<td>Can further develop aligned agenda, partnerships w/adjacent mvmts (e.g., Dignity in Schools)</td>
<td>Investments make up a fraction of Ed philanthropy; opp. to &quot;grow the pie&quot; by engaging funders with both social, emotional and acad. dev. and adjacent interests (e.g., civil rights, academic achievement)</td>
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<td>Need for greater equity in resources &amp; access across learning environments</td>
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### Example Specifics

- **Source:** Landscape Analysis stakeholder interviews, BCG Analysis

- **Example Specifics:**
  - Few integrated programs designed for diversity of contexts, e.g., cultures, ages, subject matter, etc. Limited reach of strongest models
  - Improved quality and reliability needed, esp. for use in continuous improvement; approach to accountability is inconsistent with lack of consensus in field
  - Limited reach of TA providers with expertise in change management; demand exceeds supply
  - Limited reach of strongest models
  - Fraction of educators reached through programs that deeply integrate social, emotional content and support adults meaningfully around cultural competence
  - Limited reach of TA providers with expertise in change management; demand exceeds supply
  - Can further develop aligned agenda, partnerships w/adjacent mvmts (e.g., Dignity in Schools)
  - Investments make up a fraction of Ed philanthropy; opp. to "grow the pie" by engaging funders with both social, emotional and acad. dev. and adjacent interests (e.g., civil rights, academic achievement)
  - Limited reach of TA providers with expertise in change management; demand exceeds supply
  - Need for greater equity in resources & access across learning environments
  - Disconnect across field on terminology for social, emotional, acad. development
  - Need for greater activation of local communities around this work
Need for strengthened field collaboration

**Today:** National Commission has been positive force for field collaboration and alignment

Since 2016, National Commission has catalyzed collaboration and alignment across the field

- Reputation as neutral space highlighted as explicit advantage for enabling diverse field leaders to collaborate (50+ partner organizations)
- Social, emotional, and academic development has gained awareness and been elevated on several partner agendas; field-supporting work (e.g., the Taxonomy Project) has gained broader awareness.

**This progress notwithstanding, there remains more work to do**

**Post-Report from the Nation:** Continued opportunity to grow coalition and support the field

Widespread belief that report alone will not catalyze lasting impact of Commission's recommendations, and that ongoing coalition needed

Opportunity to expand active coalition to grow momentum, mitigate risk of being typecast, increase diversity and inclusion of coalition leadership

- Constituencies, e.g., civil rights, academics-focused education reform, business, youth development
- Adjacent movements, e.g., Dignity in Schools, opportunity youth, college access and success, school safety, early childhood access/quality, child mental health, trauma-informed care/education

**Emphasis that coalition should connect and enable—not compete with—organizations that are building capacity of states, districts, OST providers**

Source: Landscape Analysis stakeholder interviews, BCG Analysis
Landscape Analysis narrative profiled 314 field actors, 224 of which were focused specifically on social, emotional, and academic development initiatives.

### School & program design models, curriculum, and other tools
- ClassDojo
- Big Brothers Big Sisters
- Pacing History and Ourselves
- Commons
- McGraw Hill Education

### Continuous improvement systems, measurement and frameworks
- tripod
- Texas Kindergarten Entry Assessment
- KIPP
- TURN AROUND FOR CHILDREN
- CCSR
- summit public schools

### Technical assistance (TA)
- CASEL
- the forum for youth investment
- BCG
- New York State Network for Youth Success
- ICF

### Place-based networks
- CORE
- Every Student Counts Network
- Commit!
- Marin Promise
- exSEL
- Ballmer Group

### Pre-service training
- UCLA
- RELAY/GSE
- CAEP
- EdTPA
- Best
- NNS

### In-service training
- CARE for Teachers
- NSCG
- Responsive Classroom
- Pearson
- ISTE
- Corwin

### Public funding/advocacy
- NGA
- AFT
- iNACOL
- NASBO

### Philanthropic funding
- Bill and Melinda Gates Foundation
- S. D. Bechtel, Jr. Foundation
- Stephen Bechtel Fund
- ExSEL
- everychild, one voice
- FuelEd
- NNSTOY
- ACT
- EduPorta

### Communications, advocacy and engagement
- Washington State PTA
- FuelEd
- NNSTOY
- ACT
- EduPorta
Using Landscape Analysis actors, several visualizations of relationships were created.

**Defined landscape**

Conducted a Landscape Analysis of the field via:
- Review of related research reports
- Interviews
- Web search

...in order to assess the state of the field and identify key SEAD actors

Organizational database of actors developed

**Categorized organizations**

Interviews and website review conducted for each SEAD actor identified:
- Types of work and focus of organization
- Primary implementation lever
- Publicly listed partners and funders
- Degree of SEAD focus

**Identified relationships**

Relationships between SEAD actors were identified based on partners and funders listed on website

For each organization, up to 20 partners and funders were captured

**Mapped landscape**

TouchGraph tool used to produce three types of relational maps:
- Relationships across SEAD-focused actors
- Associations of individual SEAD-actors
- Trends across universe of listed partners and funders

1. Database for relational mapping based on organizations included in Landscape Analysis narrative as of 8/1/18. Some organizations added in final revisions of Landscape Analysis narrative after database was locked were not included but flagged to add in the future. 2. If more than 20 listed on website, collected 20 most related to the space / likely to appear elsewhere in the database.
Relational map can be used to observe trends across broader Landscape and for individual SEAD actors

1. Across network of SEAD actors in Landscape Analysis
   - Identifies which SEAD actors are most connected across the field
   - Can highlight:
     - Degree of connectedness / specific relationships with other SEAD-focused actors
     - Total number of associations
     - Implementation lever

2. For individual SEAD actors in Landscape Analysis
   - Identifies relationships between specific SEAD actors in the landscape
   - Can highlight:
     - Number of relationships within network
     - Distinctions between partner and funder ties
     - Implementation lever

3. Across partners & funders named by SEAD actors in Landscape Analysis
   - Identifies trends across listed partner and funder organizations in terms of organizations that appear most frequently
   - Can highlight:
     - Most commonly occurring partner / funder organizations (including those that are not SEAD-focused)
Through Landscape Analysis, profiled 224 SEAD-focused actors that identified 908 unique partners & funders

224
SEAD-focused actors\(^1\) profiled in Landscape Analysis

105
Of the SEAD-focused actors were named as partners or funders for other SEAD-focused actors

803
Additional unique orgs. were named by SEAD-focused actors as partners or funders

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1. Includes all actors profiled in Landscape Analysis for which SEAD is either a primary focus or core to at least some work/initiatives.

Note: 314 total actors reviewed in Landscape Analysis (of which 224 had primary or partial SEAD focus). Of the 224 SEAD-focused actors, 127 listed at least 1 partner or funder and 73 did not list partners or funders on their website. The remaining 24 SEAD-focused actors were philanthropic organizations for which websites were not reviewed for partners/funders based on the methodology.

Source: Landscape analysis stakeholder interviews, BCG Analysis
224 SEAD-focused organizations: Categorized by implementation lever

Implementation Lever

- School & program design models, curriculum, and other tools: 70
  - National and regional associations: 34
  - Philanthropic funding: 20

- Continuous improvement systems, measurement and research: 22
  - Technical assistance: 21

- In-service training: 13

- Local coalition building and high visibility public campaign(s) (comms., advocacy and engagement): 13
  - Public funding and advocacy: 11
  - Networks: 8

- Pre-service training: 9
  - Social media engagement and educator-led networks (comms., advocacy and engagement): 6
  - Conveners - aligning and convening the field: 4
  - Youth voice and leadership (comms., advocacy and engagement): 4

Source: Landscape analysis stakeholder interviews, BCG Analysis
224 SEAD-focused organizations: Categorized by HQ location

Majority of organizations located on east or west coast; (further analysis required to understand extent to which due to selected sample or reflective of true concentration of orgs)

Note: Excludes 15 of 224 SEAD actors for which HQ location was not identified. Source: Landscape analysis stakeholder interviews, BCG Analysis
64% of SEAD-focused actors connected through existing funder and partner relationships

143 of 224 SEAD-focused actors connected in central map of field actors

81 of 224 SEAD-focused actors not connected to central map of field actors due to either not listing partners or funders on website OR not listing partners or funders that overlap with central map of actors

Majority of these actors (57%) did not list partners or funders on website

Note: In order for an organization to appear in this view, they needed to show up in our original list of SEAD-focused actors (224) and have at least one association that connected them to other organizations in the map. There are additional organizations in the database that do not appear in this view.

Source: Landscape analysis stakeholder interviews, BCG Analysis
Relational network map of all interconnected SEAD actors

Color of box organized by primary lever

- Continuous improvement systems, measurement and research
- Conveners - aligning and convening the field
- In-service training
- Local coalition building & high visibility public campaign(s) (comms, advocacy and engagement)
- National and regional associations
- Networks
- Philanthropic funding
- Pre-service training
- Public funding and advocacy
- School & program design models, curriculum, and other tools
- Social media engagement and educator-led networks (comms, advocacy and engagement)
- Technical assistance
- Youth voice and leadership (comms, advocacy and engagement)

Philanthropic organizations tend to be well connected / have high number of associations so cluster towards center

Organizations that align and convene the field as well as those involved with research are somewhat clustered together towards the center

TA providers are generally less-well connected, and thus do not appear in the center of the map

Note: In order for an organization to appear in this view, they needed to show up in our original list of SEAD-focused actors (224) and have at least one association that connected them to other organizations in the map. There are additional organizations in the database that do not appear in this view.

Source: Landscape analysis stakeholder interviews, BCG Analysis
Top 50 partner/funder orgs named by SEAD actors include concentration of major foundations as well as 10 large private-sector companies.

**Partners & Funders named by 4+ SEAD actors**

- 10 corporate partners/funders in top 50 present potential opportunity to engage more directly as part of funder group going forward.

- Partners/funders that are mentioned most frequently include high concentration of philanthropic organizations.
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Four main areas to refine and enhance Landscape Analysis going forward

Expand the universe of profiled actors
- Include broader set of stakeholders including more from adjacent movements
- Extend reach to more consistently capture regional and local actors

Refine the analysis to ensure greater accuracy
- Capture information on partners and funders for organizations that do not publicly name those relationships on their website
- Refine categorization by implementation levers based on further socialization with stakeholder community

Collect and analyze additional data fields. For example:
- Board member composition including demographic information
- Associated frames used by organization
- Years of operation
- Student/youth populations served including age range, demographics, etc.
- Organizational size and scope, e.g. budget, number of school districts served

Enhance approach for collecting data
- Create more defined process for collecting data systematically from universe of SEAD actors (e.g., survey)
- Consider automated methods for capturing data (e.g., webscraping)
Potential uses of the Landscape Analysis narrative

- Increase general knowledge and 'get smart' on current state of SEAD field capacity
- Identify potential partners or other actors working in same or adjacent spaces for collaboration
- Inform organizational decisions related to potential opportunities, based on existing trends and gaps
- Inform work with lessons from other movements and initiatives
Next steps

Download and share the full Landscape Analysis! Today's presentation and Landscape Analysis documents available here:


Landscape Analysis to be updated over time - exact cadence TBD

Reach out to with any questions!

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Questions?