Dear Colleagues,

As we transition into the 2022-23 school year and reflect on the most recent year, there has been a great deal happening and changing in the public education arena. Our grant partners continue to push the work forward for students, amidst continuing challenges from the COVID-19 pandemic and its many lingering effects. At The Belk Foundation, we remain deeply committed to our goals around K-3 literacy and equitable access to effective teachers for all students, knowing that a solid start and access to excellent educators remain foundational to educational success.

Change and transition are underway at The Belk Foundation. Our first executive director, Johanna Anderson, transitioned out of her role at the Foundation at the end of May 2022. She served the foundation for nearly 13 years and set a charge and course for our work at a local, state, and national level. I very much appreciate Johanna and the incredible work that she did for our family’s foundation, and ultimately, the students of Charlotte-Mecklenburg Schools and North Carolina. I am also excited to introduce our new Executive Director, Jevelyn Bonner-Reed. She brings different skills and experience to the Foundation which will be very helpful towards making progress on our two strategic focus areas. We are very excited to welcome her to our team and look forward to the work ahead around our mission.

The Belk Foundation continues to hold steadfast to our core belief that all children deserve the opportunity to achieve. We believe that progress matters and we have been working strategically this past year with our partners to re-evaluate, plan, and move the work forward for students, specifically with setbacks and obstacles to learning within the pandemic. Change continues to occur across the Charlotte education landscape and we are committed to providing steady and targeted support to the school system and others who support it.

Within our priority of early grade literacy, we want to lift up the work of our teachers and school staff around the state of North Carolina. As a part of the Excellent Public Schools Act (Senate Bill 387), elementary instructional staff around the state have been engaging in LETRS training, a deep, job-embedded training in the science of reading. We are also focused on collaborating with other statewide organizations to elevate the teaching profession through a career pathways model that offers the potential for substantial raises in compensation and opportunities for learning and advancement to North Carolina educators. I am excited about the work thus far and am looking forward to continuing to make an impact over the next year as it relates to teacher preparation, licensure, and career advancement.

Our Fiscal Year 2022 Report highlights 25 new grant commitments bringing our total grant investment to over $2.4 million this year. We invite you to learn about our partners and their meaningful work for students and educators.

I firmly believe that we are at a pivotal moment in public education both as a city and a state. We are committed at The Belk Foundation to providing strong, data-based support to increase results and outcomes for all students.

John R. Belk
Board Chair

Welcome Letter from New Executive Director, Jevelyn Bonner-Reed

Greetings!

I am beyond excited and honored to be the new Executive Director for The Belk Foundation. I am very much looking forward to continuing and building upon the excellent work that The Belk Foundation has done in public education within North Carolina and specifically Mecklenburg County. As a parent of public education students, I am invested in and committed to continuing the work and pushing for progress around our goals of K-3 literacy achievement and equitable access to effective teachers.

I hope that you enjoy our 2022 Annual Report and see the amazing work that has been taking place on behalf of students over the last year. I look forward to continuing our collaboration with partners this year as we continue to work together to make positive and lasting change in public education.

Jevelyn Bonner-Reed
Executive Director

The Belk Foundation Receives the 2022 ECS Corporate Award

The Belk Foundation is honored to receive the 2022 ECS Corporate Award from the Education Commission of the States (ECS) for its work in K-3 literacy and educator training in North Carolina. The Belk Foundation partnership with the University of North Carolina System to evaluate how teachers are prepared in research-based literacy instruction spurred significant progress across the state, from the Excellent Public Schools Act of 2021 to generous private investment in teacher preparation faculty. The critical nature of this work is rooted in research that shows third grade literacy is a major predictor of future academic success and thus, life trajectory.

Nominator Kelly Butler, Chief Executive Officer of The Barksdale Reading Institute, said, “The Belk Foundation serves as a model for how philanthropy can galvanize partners at the state and local level around critical education issues that otherwise become mired in politics or bureaucratic silos.”
Research has proven time and again that early literacy is critical to a child’s educational and life trajectory. Students must be proficient in reading by third grade in order to have a high chance of graduating from high school on time, and also matriculating to college. In the 2021-2022 school year, students across the board continued to be affected by the COVID-19 pandemic. When North Carolina released Spring 2021 third grade reading test scores in August of that year, we learned the true impact was worse than we imagined. The pandemic affected children across racial and socioeconomic groups; yet, children who started at lower levels of reading achievement before the pandemic particularly Black and Hispanic/Latino students and students who attend Title 1 schools fell to the lowest levels of achievement since the start of Read To Achieve.

The Belk Foundation, as a part of its mission, is dedicated to funding both early literacy and educator supports to improve early literacy results for Kindergarten through third grade students across North Carolina. At the local level in Mecklenburg County, the Foundation’s goal, in partnership with Read Charlotte, is to double the percentage of third graders reading on grade level from 39% in 2015 to 80% by 2025.

At the state level, the Foundation focuses on research, policy, and best practices to increase third grade reading proficiency. A priority is ensuring that all elementary school teachers have the knowledge and skill to teach reading to all learners. Featured below are some of strides the Foundation has made toward the K-3 literacy effort in FY 2022.

UNC Charlotte K-3 Reading Program

UNC Charlotte Reads, a program co-directed by Drs. Sam Gesel and Erin Washburn, finished up its first official year of scale up. This program targets providing enhanced clinical experiences for teacher candidates (TCs) to build their skills at being effective reading teachers who can contribute to equitable access for all students. Through this program, teacher candidates engage in an enhanced clinical experience. During this clinical experience, TCs get trained and coached to implement an evidence-based reading intervention to K-3 students in an after-school capacity, with a goal of increasing TC capacity to effectively implement an enhanced clinical experience. During this clinical experience, TCs get trained and coached to implement an evidence-based reading intervention to K-3 students in an after-school capacity, with a goal of increasing TC capacity to effectively implement those interventions to improve students’ reading skills.

Across the fall and spring semester, UNC Charlotte Reads provided an enhanced clinical experience to:

- 26 Dual Major (special and elementary education) TCs
- 26 Special Education TCs
- 11 Elementary Education TCs

Those TCs provided reading interventions to:

- 32 First and second graders in the fall semester
- 43 First and second graders in the spring semester
- 24 Rising second and third graders

Tutor and student growth exceeded goal growth across all metrics. UNC Charlotte Reads continued summer programming in July 2022 for 24 rising second and third graders. During the 2022-2023 school year, UNC Charlotte will continue to scale up for even greater impact. In Fall 2022, for example, the program will serve over 60 TCs and 75 students.

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Read Charlotte Empowering Community Partners

Read Charlotte is a capacity-building intermediary, strengthening the ability of adults in children’s lives to help them learn to read. Read Charlotte makes it easier for adults to take actions proven to help children learn to read.

In 2021, Read Charlotte’s work focused primarily in four areas spanning birth through third grade: (1) Pre-K-3 classroom instruction; (2) K-3 tutoring; (3) K-3 summer learning; and, (4) birth through third grade family empowerment to support literacy at home.

Despite the uncertainty and continued disruptions in the external environment, Read Charlotte stayed focused on their core work in 2021. They strengthened their ability to help more Pre-K-3 children at scale in the community through existing out-of-school programs.
Creating Equitable Access to Effective Teachers

Teachers are the single most important factor for student success. A large part of The Belk Foundation’s strategy is aimed at increasing teacher supports and strengthening teacher and leadership pipelines to improve school leadership, which in turn, leads to better student achievement.

The Belk Foundation invests in high-performing, outcomes-oriented, sustainable programs and strategies: recruiting the most qualified candidates into the profession; developing current professionals so that they can improve their ability to help students achieve; and retaining the highest performing professionals. This section highlights some of the programs The Belk Foundation helped to develop or advance in FY 2022 that are designed to ensure all classrooms have equitable access to effective teachers.

Advancing Educational Opportunity in Charlotte-Mecklenburg’s Lowest-Performing Schools through Teacher Recruitment, Development, and Retention

This partnership with North Carolina State University was designed as a three-year project with Charlotte-Mecklenburg Schools (CMS) to support and improve reforms for the district’s lowest-performing schools, which serve over 6,000 students. The project’s goal is to inform district leaders about interventions for teacher hiring, development, and retention that can improve student outcomes. This initiative is critical because the district’s lowest-performing schools primarily serve low-income students and students of color who most need our attention and resources.

Dr. Lam Pham, assistant professor in the Department of Educational Leadership, Policy, and Human Development at North Carolina State University is a well-regarded researcher known for his human capital expertise. Investing in a university-level research team to work alongside the CMS team focused on the most vulnerable schools in the district supports the strategy goals that The Belk Foundation has set regarding creating equitable access to effective teachers.

The Latinx Leadership ‘Pipelines and Practices’ Initiative

Latinx Education (known as LatinxEd) is a non-profit educational initiative in North Carolina providing targeted, multi-year support to Latinx students and immigrant families striving for higher education and greater opportunity. Their mission is to invest in Latinx leadership and expand educational equity and opportunity in North Carolina.

The Belk Foundation partnered with LatinxEd to focus on:

1) Supporting leaders in the LatinxEd fellowship network to develop a framework for local Latinx leadership development
2) Cataloging insights and promising practices
3) Partnering with higher education institutions to recruit more Latinos in education

It is a key priority for The Belk Foundation to learn about the needs and opportunities for supporting Latinx students, families and educators. Thus, building a relationship with LatinxEd is important given their systems-level perspective and leadership development strategies. LatinxEd is building a robust network of education advocates and influencers that we can learn from and collaborate with in the future.
The Belk Foundation Charlotte Grants

Grantee Partner Impact

Augustine Literacy Project-Charlotte
K-3 achievement (Direct Service)
General operating support to provide intensive in-person and virtual tutoring to 350 aspiring first through third grade readers who are one year or more behind in reading. Students improve in foundational reading skills, which are critical to developing reading proficiency.
$100,000 (over 2 years)

Charlotte Speech and Hearing Center, Inc.
K-3 achievement (Direct Service)
Program supports 220 students to strengthen core language competencies required for literacy success. These students increase the depth and complexity of their expressive language as well as their auditory and reading comprehension. Students also receive mindfulness techniques that will reinforce key language concepts and improve executive function.
$52,500 (over 2 years)

CMS Foundation
Strengthening teachers and leaders (Direct Service)
Program support for the CMS Teaching Residency, with a goal of increasing the licensing of diverse, non-traditional teachers in the 2023-23 academic year. Deepening the impact of the CMS Alternative Teacher Licensure Pathway will support the district’s efforts to license 140 teachers, with 60% of the residency cohort identifying as non-white.
$125,000 (over 2 years)

Communities In Schools of Charlotte-Mecklenburg, Inc.
K-3 achievement (System Improvement)
Planning support for exploration of a Community School model in partnership with Charlotte Community Think Tank and Charlotte-Mecklenburg Schools to address disruption to student achievement following the pandemic. This model has had proven success all over the country with positive, evidence-based results in the most economically challenged schools.
$40,000

Helps Education Fund, Inc.
K-3 achievement (Direct Service)
Program support to deliver HELPS reading fluency program to 1,000 CMS students during the 2022-23 academic year by providing in-school tutoring for 501 elementary school students, virtual tutoring for 350 students through our Virtual Academic Clinic, and training for community partners to directly provide HELPS in their afterschool programming to 150 students.
$200,000 (over 2 years)

International House of Metrolina, Inc.
K-3 achievement (Direct Service)
Program support for 500 English Language Learners to receive literacy tutoring and support for the summer months. Eliminating the learning gap widened by COVID-19 learning loss for third through fifth grade learners who need foundational literacy skills.
$100,000 (over 2 years)

North Carolina State University
Strengthening teachers and leaders (Direct Service)
Research support for advancing educational opportunity in Charlotte-Mecklenburg Schools’ lowest-performing schools, through teacher recruitment, development, and retention. The project serves over 6,000 students who are primarily low-income students and students of color who most need the opportunity and resources.
$245,644 (over 3 years)

Queens University of Charlotte
Strengthening teachers and leaders (Direct Service)
Program support for Queens University’s School Executive Leadership Academy (SELA), a program that prepares new school leaders and principals through a partnership with Queen’s McColl School of Business, Cato College of Education and CMS. SELA, now celebrating its 10th year, was designed to accelerate the flow of qualified leaders through the principal pipeline within CMS.
$35,000

Teach For America, Inc.
Strengthening teachers and leaders (Direct Service)
Program support for recruiting, training, and developing impact-driven teachers and leaders across Mecklenburg County. Teach For America supports approximately 140 first- and second-year teachers who reach around 9,000 of the most vulnerable students in more than 40 schools in Charlotte’s highest need classrooms.
$200,000 (over 2 years)

YMCA
K-3 achievement (Direct Service)
Program support for Y Readers year-round programming to accelerate literacy growth for over 1,600 Kindergarteners through third grade students in CMS. Certified tutors will provide differentiated literacy instruction with the goal of accelerating literacy growth beyond what is expected in a typical summer and school year cycle.
$150,000 (over 2 years)

Multi-Year Grants

We continued to contribute to multi-year grant commitments:* EducationNC $30,000
Read Charlotte $150,000
UNC Charlotte Cato College of Education $138,240
Heart Math Tutoring, Inc. $60,000
BEST NC $35,000
Profound Gentlemen $124,834
Education Policy Initiative at Carolina $34,121
The University of North Carolina at Chapel Hill $96,245
UrbanPromise Charlotte $65,000
ourBRIDGE for Kids $35,000

*Fiscal Year 2022 pledge payment amounts

Grantee Partner Impact

Katherine Neal is a tutor who began working with Jader on Zoom when school was remote. It took some time for him to open up and become comfortable with the Augustine Literacy Project (ALP) skills Katherine was teaching him. Fortunately, it eventually translated to the classroom once he gained confidence. Jader shared, “I love reading with Ms. Katherine. She is kind, responsible, [and] caring.”

Katherine began tutoring Aylin, Jader’s sister, in the Fall of 2021. Even though she did not know the letters and sounds initially, she picked up the skills quickly because she had a motivation to learn. Aylin became a leader at her classroom table by encouraging others to read. “My favorite thing to do at school is rhyming words with Ms. Katherine.”

Their mother says it is emotional for her because, “For me, it’s important for them to learn to read in English. I think [reading] is what helps them to have a better future.” ALP transforms the lives of tutors and their students, creating a better future for aspiring readers.

The mission of Y Readers is to provide the additional support that students need to be proficient in reading by the end of third grade. The program also supports community-wide efforts to prevent summer learning loss and help close the achievement gap. Y Readers serves students in rising grades K-3 who are not reading on grade level. During summer 2021, the Y Readers program operated at five CMS schools, serving students in-person for four weeks. Y Readers also offered a six-week virtual tutoring program for families who were not yet ready to send their child to in-person programming. It took some time for him to open up and become comfortable with the skills Katherine was teaching him. Fortunately, it eventually translated to the classroom once he gained confidence. Jader shared, “I love reading with Ms. Katherine. She is kind, responsible, [and] caring.”

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**The Belk Foundation  North Carolina Grants**

**digiLEARN Digital Learning Institute**

**Strengthening teachers and leaders (System Improvement)**

Program support to create recommendations for micro-credentials that will lead to state-wide systemic improvements in how North Carolina teachers are developed, recognized, and rewarded. This will lead to policies and practices that will ultimately improve student learning outcomes.

-$50,000$

**KIPP Charlotte, a regional school of KIPP North Carolina**

**Strengthening teachers and leaders (System Improvement)**

Planning support for exploring the launch of a KIPP North Carolina Educator Preparation Program to train and license teachers. The goal is to raise the student achievement levels of students taught by the teachers in the program and retain those teachers in their profession for longer than the market average.

-$50,000$

**Latinx Education Center (LatinxEd)**

**Strengthening teachers and leaders (System Improvement)**

Program support for the Latinx Leadership Pipelines and Practices Initiative. LatinxEd works with leaders in the LatinxEd fellowship network to develop a framework for local Latinx leadership development, catalog insights and promising practices, and partner with institutions of higher education to recruit more Latinos in education.

-$50,000$

**myFutureNC, Inc.**

**Strengthening teachers and leaders (Reform Environment)**

General operating support for myFutureNC to ensure two million North Carolinians have a high-quality credential or postsecondary degree by 2030. Over the next eight years, myFutureNC will deepen collaboration across the education and workforce continuum to eliminate barriers to achievement, prepare students for work, and expand opportunities for skills training in local communities.

-$50,000$ (over 2 years)

**National Council on Teacher Quality**

**Strengthening teachers and leaders (System Improvement)**

Program support for illuminating new data to improve teacher preparation and literacy outcomes. The support allows the National Council on Teacher Quality to engage in collecting reading data from the state, preparing North Carolina’s reading pass rates “dashboard,” providing eight different perspectives on the data, and communicating with decision makers and influencers.

-$50,000$

**North Carolina State University**

**Strengthening teachers and leaders (System Improvement)**

Research funding to survey elementary school principals across the state on how current practices are aligned with new standards for effective Pre-K through third grade leadership. Additional work in phase two of the project includes developing a North Carolina Early Grade Leadership Collaborative tasked with leveraging the survey results to co-design ideas to be tested with sample school districts across the state.

-$150,000$

**North Carolina Alliance for School Leadership Development**

**Strengthening teachers and leaders (System Improvement)**

Design and evaluation support for the AP Accelerator, targeted leadership development and coaching of North Carolina’s strongest assistant principals in order to increase the number of principal-ready candidates across the state. The shortage of principal-ready candidates hires highest needs schools especially hard where turnover is the highest and conditions are the most challenging.

-$93,000$ (over 2 years)

**Profound Ladies**

**Strengthening teachers and leaders (System Improvement)**

Program support to recruit and retain Black, Indigenous Women of Color and provide them with mentors, professional development, and other support to build their capacity as educators and leaders.

-$28,000$

**Public School Forum of North Carolina**

**Strengthening teachers and leaders (System Improvement)**

Program support for a cohort of six school districts and educator preparation programs to create models for recruiting and retaining the workforce to ensure all North Carolina students have access to highly effective, diverse teachers.

-$160,536$ (over 2 years)

**TNTP**

**K-3 achievement (System Improvement)**

Program support for the NC Early Literacy Collaborative that will support select districts in implementing evidence-based, high-quality literacy instruction and materials for Pre-K through third grade students.

-$100,000$

**UNC System**

**Strengthening teachers and leaders (System Improvement)**

Program support for a deep dive into the literacy standards, programs, and practices of all UNC system educator preparation programs. The funds support improvement of both the literacy framework and implementation guidance for educator preparation programs.

-$24,000$

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**Grantee Partner Impact**

**Next Gen Capacity-Building Grants**

**Black Child Development Institute-Charlotte**

Charlotte, NC

Support to upgrade technology for this growing organization.

-$11,660$

**International House**

Charlotte, NC

Support to upgrade technology and software for the organization.

-$12,340$

**BEST NC State Level - NC**

Grant to enhance fundraising and membership strategy to attract “next generation” business leader involvement.

-$6,000$

Continuing the family legacy, the Next Generation Advisory Board is comprised of fourth generation Belk family members who have come together to learn about The Belk Foundation legacy and mission by running their own grantmaking process.
We build relationships with high-achieving organizations and results-oriented school systems in the hopes that, together, we will be catalysts for lasting change.