BELK FOUNDATION
Learn. Connect. Achieve.

Impact Plan

Approved by the Board May 7, 2019

Background on Belk Foundation Grantmaking

Over the decades, the Foundation has been rooted in community, investing in myriad causes that aligned with the founders' interest in the "upbuilding of mankind." The past decade has seen the most significant evolution in the Foundation's strategy towards this end. In 2010, the Foundation adopted a new mission:

The Belk Foundation believes that education is a basis for successful society and that a quality education is the right of all children and youth. Our mission is to invest in schools and organizations that work aggressively to ensure all students graduate from high school and continue on an intentional path toward college, career and life.

After three years of learning about and investing in K-12 achievement and post-secondary access, in 2013 the Foundation decided to focus in two areas shown to have significant influence on a student's long-term academic success: **Achievement by 3rd Grade** and **Great Teachers and Leaders**.

In 2016, precipitated in part by the sale of the family's company, Belk, Inc., the Foundation decided to "double-down" its efforts in its hometown, Charlotte, and home state, North Carolina. It remains committed to the mission and focus areas.

Over time, the Foundation has recognized the impact of engaging in the mission "beyond grantmaking", through advocacy and convening. In 2014, the Foundation's role in spearheading what became Read Charlotte, a community-wide effort to double reading proficiency, opened its eyes to the possibilities for extending impact by zeroing in on key issues within its focus areas.

In 2017, the Foundation began a process to identify a second issue within its two focus areas to dedicate additional attention over the next five years. In 2018, it selected the strategic issue of "equitable access to effective teachers" as an important lever to meet its mission.

This Impact Plan sets the context for the way the Belk Foundation invests in its mission and lays out its commitment to addressing its two strategic issues, Third Grade Reading Proficiency and Equitable Access to Effective Teachers.

Grantmaking Strategy

The Foundation's Grantmaking Strategy is framed by its ***Beliefs to Action*** statement (Addendum A), developed by the Board over the years and adopted with this Impact Plan. The Foundation invests approximately 5% of its endowment annually in grants intended to further its mission. On average, the annual grantmaking budget is $2 million.

Focus Areas: The Foundation has two primary focus areas: **Achievement by 3rd Grade** and **Great Teachers and Leaders**. At times, these focus areas overlap; a key strategy to strong achievement in grades K-3 is having an effective teacher, led by a strong principal. Typically, the Great Teachers and Leaders focus area spans the K-12 system, as human capital system strategies to recruit, hire, and retain great talent do not fit neatly into a grade-specific band. On average, the Foundation strives to devote equal grant funds to each focus area.

Goals, Strategies and Metrics: Each focus area has specific goals, strategies, and recommended metrics. This information is represented in the ***Grant Strategy Framework*** (Addendum B).

Target Population: We believe that all children can achieve, which is why the achievement gap between low income students and their wealthier peers is unacceptable and must be closed. We concentrate our resources on students who need them the most – typically students who are of color and/or low-income. When investing in system-improvement, we ensure considerations are made with an equity lens. We believe that strong systems are those that meet the needs of all children.

Geography: The Foundation is fortunate to be based in a region with a strong unified school system, Charlotte-Mecklenburg Schools ("CMS"). CMS is within the top 20 largest school districts in the country, with over 140,000 students. The student population is diverse both ethnically and economically. Because of its size, diversity, and track record for pursuing innovative educational practices, CMS often influences state educational practices and policies.

The Foundation recognizes, though, that while CMS often influences policies, it is also impacted greatly by decisions made at the state level. As such, the Foundation seeks opportunities to build relationships and connect ideas between Charlotte and state decisionmakers through its grantmaking, convening, and advocacy.

On average, the Foundation strives to devote 70% of grant funds to Charlotte and 30% to state-level investments.

Types of Grants: Building on the theme of connectivity, the Foundation values investing at many levels of impact. Grants typically fall into three categories: (1) Direct Service: programs and interventions that directly support students and educators, (2) System Improvement: building capacity within a larger system to meet the needs of students and educators, and (3) Reform Environment: informing and advocating for smart decisions that affect students and educators. Further definition of these three types of grants, with what is looked for in investment opportunities, can be found in the ***Framework for Considering Grants*** (Addendum C).

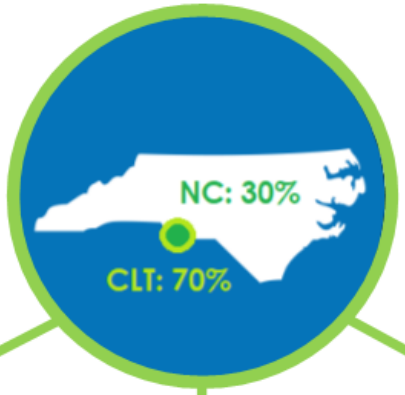
Beyond Dollars - How we work with Grantees: The Foundation believes that its grantmaking can be magnified by dedicating time and energy beyond the standard grantmaking process. In addition to our roles in sourcing, vetting and supporting grantees, we also engage in the following activities: advocate for funding and connect grantees with potential donors, coach organizations on strategy and program evaluation, and host meetings and events for grantees on mission-related issues.

Strategic Issues: A subset of the two focus areas, Strategic Issues are where the Board and Staff have decided to dedicate intentional and proactive time and energy "beyond grantmaking". The intention is to spend at least 10% of time to each of the two issues, researching what works, hosting convenings, and advocating for solutions.

The Belk Foundation Grantmaking and Beyond

MISSION

The Belk Foundation believes that education is a basis for successful society and that a quality education is the right of all children and youth. Our mission is to invest in schools and organizations that work aggressively to ensure all students graduate from high school and continue on an intentional path toward college, career and life.



GEOGRAPHY

Charlotte-Mecklenburg is our home. While CMS often influences policies, it is also impacted greatly by decisions made at the state level. On average, the Foundation strives to devote 70% of grant funds to Charlotte and 30% to state-level investments.

40% Direct Service

Programs and interventions that directly support students and educators

30% System Improvement

Building capacity within a larger system to meet the needs of students and educators

30% Reform Environment

Informing and advocating for smart decisions that affect students and educators

FOCUS AREAS

K-3 Core Achievement — 50%

Investing in strategies that ensure students perform on or above grade level in core subjects by third grade, beginning with the kindergarten year.

50% Great Teachers and Leaders

Investing in high performing, outcomes-oriented, sustainable programs and strategies that recruit, develop and retain effective teachers and leaders.

STRATEGIC ISSUES

A subset of our two focus areas, these strategic issues are where the Board dedicates time and energy "beyond grantmaking". A portion of the Focus Area dollars are dedicated to aligned grants.

Third Grade Reading Proficiency

Equitable Access to Effective Teachers

Target percentages are meant to serve as guidelines and are not set allocations.

K-3 Focus Area Strategic Issue

➔ Increase the % of children who finish 3rd grade at College and Career Ready on the state reading assessment from 25% in spring 2022 to 80% by spring 2030.

Third Grade Reading Proficiency

In February 2014, The Belk Foundation convened leaders from local foundations, businesses, the school district, county and the library to discuss a community crisis: only 40% of Charlotte's third graders were reading on grade level. National research indicates third-grade reading is a strong indicator of both high school graduation and college matriculation. Although Charlotte-Mecklenburg was better than the average for large public cities (26%) and the national average (34%), this wasn't good enough for these leaders.

This initial conversation led to a commitment by this group to organize a Third Grade Reading Task Force, which met throughout 2014 to review key research, build on past community efforts and define the goal, scope and pillars of a potential community-wide collective impact effort around early childhood literacy. In early 2015, the Task Force reorganized as the governing board of the newly named **Read Charlotte**. After a national search, Read Charlotte hired Munro Richardson to lead the initiative.

After two years of research and alignment, Read Charlotte moved into implementation in collaboration with an army of dedicated groups and individuals across Charlotte-Mecklenburg.

- Their work is defined by *four major areas of activity*: research and data, improving systems, strategic funding, and building networks.
- To move the needle on literacy, Read Charlotte focuses on *five levers*: Great Teaching, Empowering Families, Building Home Libraries, High-Quality Targeted Tutoring, and Summer Reading.

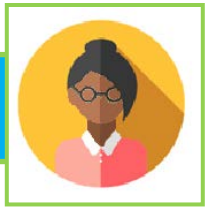
How the Foundation continues to support its "original" Strategic Issue: Third Grade Reading Proficiency and what became Read Charlotte was the first mission-aligned strategic issue of the Foundation. The Foundation dedicated intentional time and energy beyond grantmaking to build community-level awareness and determination to find solutions. This commitment will continue through Read Charlotte's 2030 goal, aligned to the Read Charlotte strategic plan and primarily in the form of these actions:

Board Service	Lead Funding	Aligned Funding	Strategic Guidance	Sharing Lessons
Executive Director Jevelyn Bonner-Reed serves on the Read Charlotte Board. Foundation Board Member Katie Morris is the founding chairperson of the Read Charlotte Board.	The Foundation is a committed "Lead Funder" of Read Charlotte operations.	Within its K-3 focus area, the Foundation aligns its literacy-related funding to Read Charlotte priorities, particularly the levers of Great Teaching, Tutoring, and Summer Reading.	Both Katie Morris and Jevelyn Bonner-Reed spend additional time serving as thought-partners and collaborators with Read Charlotte staff to fundraise for Read Charlotte identified priorities, advise on strategy, and build connections.	Through relationships at the state level, the Foundation shares lessons learned from Read Charlotte with state level practitioners and policymakers.

Teacher and Leader Focus Area Strategic Issue

➔ More equitable access to excellent teachers by *expanding the pool* and *extending the reach* of effective teachers

Equitable Access to Effective Teachers



Teachers are the most important in-school factor for student achievement. A teacher is estimated to have two to three times the impact of any other school factor on a student's performance. And we know that embedded peer support from excellent teachers leading small teams of teachers can have significant effects on their colleagues. There is a need to better prepare new teachers who are likely to serve students who are low-income and/or of color. Schools with high concentrations of students who are low-income and/or of color have greater numbers of beginning teachers, who turn over at higher rates. From research, we know better-prepared teachers are more than twice as likely to remain in the classroom.

CMS's *Breaking the Link* report exposed the inequitable distribution of highly effective teachers across and within the district's schools, by race and income level.

- CMS has a lower percentage of teachers Exceeding Expected Growth than the state. In the 2016-17 school year, only 16% of CMS teachers exceeded expected growth, compared to NC's 20%. In high poverty schools in CMS, only 13.8% of teachers exceeded growth.
- Low-income students of color are much less likely to have a teacher who exceeds growth. In EOG tested subjects, 42% of white students in low poverty schools are taught by a teacher who exceeded growth the previous year, compared to only 27% of black and Hispanic students in high poverty schools.
- Beginning teachers are much more likely to be hired late and placed in higher poverty schools. 19% of white students in low poverty schools had a beginning teacher compared to 37% of black students and 33% of Hispanic students in high poverty schools.

The Foundation believes that one powerful way to decrease student achievement gaps is to increase the chances that students who are low-income and/or of color have a highly effective teacher. The disparities in access that we see in Charlotte and across our state are only exacerbating the persistent achievement gaps that exist.

In evaluating the many "entry points" to the talent pipeline, the Foundation identified *expanding the pool* of well-prepared beginning teachers and *extending the reach* of existing highly effective teachers as important areas to focus.

Our goal is a simple one: Increase the odds that students who are low-income and/or of color will be taught by highly effective educators.

Strategic Issue Logic Model

If students who are low-income and/or of color have **better prepared beginning teachers** and **more effective experienced teachers**, their academic achievement will increase.

Resources		Strategies	Outputs	Outcomes	Impact

- Facilitating partnerships between systems
- Advocacy on issues (communicating formally/ informally, externally/ internally)
- Grantmaking dollars
- Sponsoring research
	Expanding the Pool	- **Enhancing quality of clinical experiences**[1] in teacher preparation for candidates more likely to be hired and excel in high-poverty schools
		  - In traditional routes
		  - In new residency license and other alternative programs
		- Brokering **shared governance and deeper partnerships between educator preparation providers (EPPs) and school districts** that lead to better clinical experiences
			- More EPPs are enhancing clinical experiences through better placement, coaching, and support
			- More EPPs and school districts have formed formal partnerships that share governance over clinical experiences
				- Beginning teachers in high-poverty schools are as prepared as beginning teachers in lower poverty schools. [Proposed metric: edTPA scores]
				- Beginning teachers in high-poverty schools are evaluated as effective as beginning teachers in lower poverty schools. [Proposed metrics: EVAAS, classroom observations, student surveys]
					All students are making positive academic gains and are being prepared for college, career and life.
					
					[Proposed metrics: % students exceeding expected academic growth, making progress towards college and career readiness standards (proficiency rates in NC College and Career Ready Standards, ACT, WorkKeys), and are cared for, supported and challenged (student surveys, attendance, and behavior data)]

	Extending the Reach	- **Supporting school principals** to make talent management decisions that give students who need additional support a more equitable chance at a highly effective teacher[1]
		  - Using effectiveness data to schedule teachers to students who need more help
		  - Implementing innovative staffing models[1] that extend the reach of highly effective teachers through teaching more students or building capacity of other teachers
			- School leaders are using effectiveness data in scheduling educator talent with an equity lens across and within all schools
			- More districts are using innovative staffing models in their schools to increase the reach of highly effective teachers to students who need more support
				- Students who are low-income and/or of color have effective teachers at the same rate as their higher income white peers across and within schools. [Proposed metrics: EVAAS, classroom observations, student surveys]	

[1] See Key Concepts and Definitions for "Effective Teachers", "Quality Clinical Experiences" and "Innovative Staffing Models"

Key Concepts and Definitions:

Effective Teachers: What do we mean by "effective teachers"? In essence, effective teachers are those who *connect with students and positively contribute to their learning and development*.

As with any profession, there is a range of effectiveness across teachers, and we do not always know what practices or characteristics are associated with teacher effectiveness. Indeed, it is likely that they can be effective or ineffective in a variety of ways. Thus, finding a single definition, much less a measure, that encapsulates "effectiveness" is challenging. No one characteristic in isolation determines effectiveness. For example, teachers need to know their content area, but without the ability to communicate and connect with students, that knowledge doesn't get transferred. What we know is that effective teachers tend to:

- Have high cognitive ability and knowledge of their content
- Be conscientious, have a growth-mindset, set goals and use data to drive results for students
- Be culturally-aware and teach in culturally responsive ways
- Be good communicators and motivate all students to learn
- Believe in children and have high expectations for all students
- Diagnose student learning, differentiate instruction, and skillfully select strategies and resources to reach all learners
- Establish safe, supportive, engaging and purposeful learning environments
- Make students feel cared for, inspired and challenged
- *Among many, many additional daily acts of service, dedication, and care*

Although motivated by the access inequities based on EVAAS distributions in CMS schools, we believe "effective teachers" are more than teachers who exceed expected growth or rate accomplished or above on annual evaluations. We also know that what we have as proxies for teacher effectiveness do not capture the full extent of a teacher's contributions to students. Importantly, however, we should seek to learn from the variation in teacher effectiveness so as to lead to systemic improvements in the quality of the teacher workforce. For example, information about teacher effectiveness can help us: know what kinds of support they need, inform improvements in teacher preparation, and select teacher leaders, to name a few.

Quality Clinical Experiences: Within the field of teacher preparation, there is evidence that preparation linked to practice benefits teachers early in their career. Although "student teaching" is not new, recent research points to the importance of where and with whom these clinical experiences take place. What we know so far about quality clinical experiences is that:

- **Placements matter**: High-quality clinical experiences typically occur in high-quality learning environments. These are environments where teachers are collaborating, teachers are staying, and students are making a lot of learning growth.
    - Furthermore, early-career teachers seem to benefit from clinical experiences that more closely approximate their in-service environments. This means securing a job in a school that is comparable to their student teaching school or even in the same school building. Too often we see beginning teachers in high-poverty schools struggle partly because they practiced teaching in less complex, lower-poverty settings.
- **Mentors and coaching matter**: High-quality clinical experiences typically occur when a pre-service teacher is matched to a clinical educator who is both instructionally effective *and* an effective coach/mentor.

In most cases, educator preparation providers rely on schools and districts to host pre-service teachers for these clinical experiences. Given the importance of clinical experiences in preparation, the Foundation believes that creating strong partnerships and shared governance between EPPs and school districts is a system issue that must be addressed.

Innovative Staffing Models: The one-teacher, one-classroom model is a traditional structure that limits student access to the most effective teachers. Over the years, the Foundation has invested in innovative staffing models such as Opportunity Culture that allow highly effective teachers to reach more students directly or by coaching teams of teachers. Changing the traditional staffing structures of schools is no easy feat, but schools that have embraced this work are beginning to see growth in both student achievement and teacher support. We believe these models have myriad benefits: attracting and retaining effective teachers, providing imbedded coaching and support to all teachers, and increasing the chances that students get access to top talent. For these models to be strong and sustainable in the long term, it's critical for them to be structured in cost-neutral ways, taking into account resource reallocation.

Tracking Progress: Although it is undeniable that excellent teachers can have significant impact on students, how to measure that impact, much less *predict* or *differentiate* effective teachers, causes much consternation. What is clear in the data is that when proxies for preparedness or effectiveness show variation, students who are low-income and/or of color have consistently higher rates of less prepared and less effective teachers.

Admittedly, our current measures for preparedness and effectiveness are single data points of a teacher's capacity or contributions to the classroom. In tracking progress in equitable access, we must be practical about the availability and feasibility of teacher effectiveness measures. In selecting partners, developing strategies, and advocating solutions, we will seek out those who share a healthy respect for what quantitative measures can tell us, while holding the nuanced and complex attributes of the profession.

In addition to the current measures in place for gauging teacher preparedness and effectiveness in North Carolina, the Foundation will advocate for multiple measures that provide district and school leaders a more complete picture of their teaching force. One important

data source are student surveys, which have shown high predictability of teacher effectiveness. Student surveys can also tell us whether students are in classroom environments where they feel cared for, supported, and challenged: important conditions for both cognitive and non-cognitive skill development.

Along with the Outputs and Outcomes represented in the above Logic Model, the Foundation recognizes that progress comes in many forms. We hope to build awareness and commitment to the Strategic Issue using our influence and lever-age. As such, we will also track the following changes in Mecklenburg County and at the State level:

Types of Systematic and Structural Outcomes	
Influence: - Changes in visibility of issue - Changes in partnerships - Changes in organizational capacity - Changes in availability of data or analyses - Changes in public and/or political will - Changes in policies and/or regulations - Changes in practices	**Leverage**: - Changes in public funds - Changes in philanthropic investments

Drivers of Quality: As a complement to the ***Beliefs to Action*** statement, the Foundation has adopted five Drivers of Quality for this strategic issue:

- *Learning by Doing*: Adult learners improve by practicing their craft and receiving coaching from experts.
- *Data for Improvement*: Data should be used to guide continual improvement cycles and ensure changes are leading to results.
- *Leadership is Critical*: System and school leaders set the tone, galvanize support, and ensure implementation. Programmatic changes without leadership buy-in will not succeed.
- *High Standards for Learning*: Talent development strategies should be aimed towards ambitious goals for student learning and teaching. Strong student learning standards should drive at every stage what teachers need to know and be able to do.
- *Intentional Partnerships*: True partnerships are mutually beneficial, clear, and accountable.

Research Needed: The Foundation is committed to using data to drive changes in the system. In order to best implement strategies, it is recognized that further analysis is required on effective teachers within CMS and across NC:

- Who are the more effective beginning teachers in high-poverty schools in CMS and across NC? Factors to understand: Prep route, where they student taught, how they got hired, what they knew when they started, what they didn't know and how they improved, participation in induction programs, ethnicity, gender

- Who are the highly effective teachers in high-poverty schools in CMS and across NC? Prep route, years of experience, how did they get hired, why the remain in the classroom, ethnicity, gender

We are particularly interested in the compelling research on the impact of teachers of color on all students, especially students of color. On an ongoing basis, we will develop a research agenda that prioritizes questions to guide our understanding and inform strategies. Deeper analysis on the demographics of effective teachers in CMS will be part of that work.

Advisory Group: An Advisory Group was formed to assist the Board of Directors in fulfilling its work and mission relating to the Strategic Issue. Advisory Group Members were deeply knowledgeable about the Strategic Issue of more equitable access to excellent teachers.

The Advisory Group responsibilities included:

1. Connect The Belk Foundation to research and best practices related to the Strategic Issue.
2. Provide guidance on emerging strategies, especially as they relate to realities of district and school contexts, while thinking big-picture and beyond the priorities of own organization.
3. Identify and help develop responses to current and emerging issues and needs.
4. Review select grant applications focused on the Strategic Issue and provide feedback to The Belk Foundation Grants Committee for their review.
5. Encourage approaches that push boundaries for the sake of students, fueled by a spirit of optimism, creativity, and urgency.

Funding Partners – Current and Prospective: The Foundation prefers to partner with other funders when feasible. We benefit from the philanthropic investments of local, state-level and national funders. We believe Charlotte and North Carolina more broadly have many factors that make them compelling investment sites and see it as a responsibility to advocate for our state to other funders. Throughout the five-year strategy, we will make it a priority to seek more philanthropic partners towards this issue.

Risks and Related Factors: Inspiring and implementing change within and across large systems is no small feat. The Foundation understands the complexity of our aspirations, and that many factors out of our control can impact the likelihood of success.

- Pipeline into teaching profession: who (quality) and how many (quantity) are choosing teaching
- State policies on important considerations, such as teacher pay and licensure
- Principal quality
- Effectiveness data: the availability and reliability

- Economic conditions: a worsening economy tends to lead to higher teacher retention, but less revenue for school district; improving economy means more beginning teachers have additional options outside of teaching
- System leadership: the consistency, prioritization and buy-in of the issue

Policy Engagement: As a private foundation, we cannot engage in lobbying, but we can provide general operating support to nonprofits that advocate for sound policy, fund research that analyzes policies and programs, and host community forums that educate about important topics. The Foundation intends to explore all tools as appropriate to educate and encourage research-informed decision-making by practitioners, system leaders and policy makers.

Ideally, the Foundation intends to bolster the recommendations of existing practice and policy analyses already underway in the state:

- *Expanding the Pool*: NC Professional Educators Preparation and Standards Commission; Southern Regional Education Board (SREB); Leandro Study by WestEd; Research commissioned by the UNC System
- *Extending the Reach*: Advanced Roles Pilot Evaluation by the Friday Institute; Leandro Study by WestEd

Strategic Communication and Convenings: Foundations have a platform that can shine light on issues. The Foundation plans to advocate for the Strategic Issue through the following mediums:

- Annual Report: the annual "Letter to Friends" will spotlight the Strategic Issue, including data, grantees, and lessons learned.
- Belkfoundation.org: a special section will be dedicated to the Strategic Issue, including data, grantees, and lessons learned.
- Social media: the Foundation's LinkedIn and X accounts will be utilized to circulate findings and spotlight partners' work.
- Articles: the Foundation will encourage partners to write articles that call on the importance of the Strategic Issue and ways to increase access to effective teachers.
- Local convenings: the Foundation will host expert speakers and forums on the Strategic Issue.

ADDENDUM A

Beliefs to Action: *What we believe, and what we do about it*

ALL CHILDREN DESERVE THE OPPORTUNITY TO ACHIEVE – We believe that all children can achieve, which is why the achievement gap between low income students and their wealthier peers is unacceptable and must be closed.

- It's in our community's best interest to seek equity in access to excellent teachers and leaders, funding, and additional supports for student learning.
- Evidence shows that providing foundational concepts early in a child's life is critical to future learning. Building a strong base early decreases the need for costly and challenging remediation over time.

How we work to achieve this:

- ✓ We concentrate our resources on students who need them the most – typically students who are of color and/or low-income.
- ✓ When investing in system-improvement, we ensure considerations are made with an equity lens. We believe that strong systems are those that meet the needs of all children.
- ✓ We prefer structural improvement that promotes prevention, rather than more resources towards repair.

LEADERSHIP IS CRITICAL – Leaders can make or break an organization, system, school, or classroom.

- School leaders are vital to setting high expectations and fostering a team of educators who can meet them.
- For their students to succeed, all educators – from classroom teachers to district leaders – benefit from a comprehensive human development strategy that includes coaching, access to reliable progress data, continual reflection, and opportunities to grow professionally.
- As professionals responsible for the vital goal of student learning, teachers and leaders should be both supported and held accountable for their impact on student achievement.

How we work to achieve this:

- ✓ We seek partnership opportunities that take into account the interrelated parts of a human capital system.
- ✓ We consider strongly the effectiveness and track record of the leadership team, from the executive staff to the board.
- ✓ We evaluate leadership's commitment and expect evidence of support before investing.

PROGRESS MATTERS – Measurement and evidence are critical to know if progress is being made – with organizations, interventions, and ultimately, students.

- Curriculum and instructional interventions should be evidence based and research informed.
- Great schools and districts should have autonomy to innovate and make decisions in the best interest of students. With autonomy comes accountability for results for students.
- Academic *proficiency* is one of the most important goals for all students, but academic *growth* is a useful yardstick for progress.

How we work to achieve this:

- ✓ In an effort to achieve the strongest outcomes, we prioritize investments that incorporate evidence-based strategies.
- ✓ We are interested in supporting partners that measure their performance, through both qualitative and quantitative metrics, and continually use this information to assess their program effectiveness and improve outcomes.
- ✓ We use evaluation to assess program effectiveness and organizational learning rather than solely compliance.

STRONGER TOGETHER – We strive to be ever-focused on what's best for students and prioritize transparency, accountability, continuous learning, and willingness to partner.

- Publicly supported and accessible schools are the bedrock of our country. Public dollars must come with transparency and accountability.
- No one organization has the answer. Working in partnership and sharing best practices will produce the best results.

How we work to achieve this:

- ✓ One of the strongest roles that we aim to play, in addition to funding, is to be a connector and advocate for positive and lasting change.
- ✓ We seek to model the kind of willingness to partner, continuous learning, and performance accountability that we expect from our grantee organizations.
- ✓ To be as grounded as possible in the realities of working with students, we take a dual approach, seeking opportunities for systemic improvement while also partnering with those making a direct impact on the students every day.

ADDENDUM B

Grant Strategy Framework

Focus Area	Goal	Sub-Goals and/or Strategies	Expected Metrics
K-3 Core Achievement	Public school students are achieving at or above grade level in core subjects (math and reading) by the end of 3rd grade.	Individualize support through **Evidence-based tutoring**	Growth on specific skills / academic progress that increases chances of child reaching grade level proficiency
Scope of Issue in Charlotte Mecklenburg: In 2024, % CMS 3rd graders "College and Career Ready": 29.0% reading 43.5% math In 2024, 70.2% of CMS 1st graders were meeting or exceeding expectations on phonics and de-coding, and 66.8% of 2nd graders could read grade level text.		Stop the summer slide through **summer learning** opportunities	Maintaining end of year academic at the beginning of next school year (minimum); growing 1-2 months in academic ability
Scope of Issue in North Carolina: In 2024, % NC 3rd graders "College and Career Ready": 29.0% reading 41.1% math		Improve **teacher knowledge and instruction** in evidence-based prac-tices	Changes in teacher practice; Forma-tive and summative achievement gains in students
		Systems and policies are research-informed and support students, families, and educators in reaching a 3rd grade proficiency goal	Policy and practice changes that are supported by research and evidence
Excellent Teaching and Leading	Effective teachers are recruited, developed, and retained in public schools.	Teacher candidates are **identified and recruited** into a preparation/ lateral entry program	Enrollment rates at EPPs, Characteris-tics of enrolled students
Scope of Issue in Charlotte Mecklenburg: *Data from 2023-2024* 8,518 teachers in CMS		**Clinically-rich preparation pro-grams** create day-one ready teach-ers prepared to excel in today's classroom environments	Pass rates of edTPA, EVAAS of gradu-ates in years 1-3

Data from 2023-2024 14.1% attrition rate overall 8.8% principal turnover rate		New teachers are hired for fit and supported in their initial 1-3 years (**hiring and induction**)	Placement timing and matches, teacher surveys, EVAAS of graduates in years 1-3, retention
		All teachers are **coached** by a master educator and have opportunities to practice instruction.	Teacher surveys (Insights, TWC); EVAAS growth
		Teachers are retained because they are **supported by their school leadership** and have **opportunities to grow** in their professional scope and responsibilities.	Teacher surveys (Insights, TWC); Retention and mobility rates
Scope of Issue in North Carolina: *Data from 2023-2024* 62 EPPs, 15,404 students enrolled (78% female, 63% white) *Data from 2023-2024* 72.5% schools met or exceeded growth 9.88% teacher attrition rate 7.5% principal attrition rate *Data from 2024-2025* 93,868 teaching positions 7.6% vacancy rate	Effective leaders are recruited, developed, and retained in public schools.	Principal candidates are **identified and recruited** into a preparation program	Enrollment rates at principal prep/ leadership development programs, Characteristics of enrolled students
		Clinically-rich preparation programs create day-one ready leaders prepared to excel in today's schools	Licensure pass rates of graduates; Hire rates of graduates
		Leaders are provided with **coaching and learning opportunities** to improve their effectiveness	Growth scores of schools
		Effective Leaders are retained	Retention in profession
	North Carolina is a top state for recruiting, developing and retaining educator talent	**Systems and policies are research-informed** and promote effective talent strategies to recruit, develop and retain talent	Policy and practice changes that are supported by research and evidence; % of LEAs employing Talent strategies supported by research; NC's talent metrics compared to other states

ADDENDUM C

A Framework for Considering Grants

The Belk Foundation has decided to focus its dollars, time, connections and influence on improving the way that students are served by public education at the local level in Charlotte and the state level in North Carolina.

To place potential investments into context of the greater mission, a framework for categorizing grants is presented.

DIRECT SERVICE GRANTS

What are they and why fund them?	What do we look for in investment opportunities?	Grantee Examples
Primarily Charlotte-area grants, these investments provide a ground-level view to working directly with students. Outcomes on student achievement are more causal in nature with this work. Both K-3 and Teacher/Leader grants fall into this category, although most will be K-3 given the systems-connection with teacher/leader opportunities. The Board believes these grants are important to keep a close touch on what is happening at the student and educator level, better informing larger-scale efforts and policy. The target allocation of these grants is 40% in Charlotte.	✓ Best in class program delivery (clearly performing ahead of similarly focused peer groups) ✓ Annual increases in reach via children served (or adults served, who will impact more children) – without compromising quality ✓ Strong, stable leadership on staff and engaged board ✓ Cost effective results ✓ Close partnership with schools and the district ✓ A learning organization that uses evaluation to improve program delivery	<u>K-3 Core Achievement</u> ▪ Tutoring ▪ Summer learning <u>Teacher/Leader</u> ▪ Teacher recruitment and development ▪ Principal preparation

SYSTEM IMPROVEMENT

What are they and why fund them?	What do we look for in investment opportunities?	Grantee Examples
To see larger scale change, we seek investments that change the way that teachers teach, leaders lead, and students achieve grade-level proficiency by 3rd grade. Larger-scale and riskier, these investment opportunities should disrupt status quo approaches that	✓ Buy-in from school district in form of in-kind or shared financial support, MOU. ✓ Multiple stakeholders at various levels are committed to the change (more than solely the Superintendent) ✓ Multi-year planning	<u>K-3 Core Achievement</u> ▪ Collective impact work to align student services and support to research and data

are failing students. They are typically reforms working directly with one or more larger institution(s) or system(s) (e.g., university, school districts). Outcomes on student achievement may be slightly more difficult to isolate (in the short term and without rigorous evaluation). These grants fall into the broader "reform" category, which targets 30% in Charlotte and 30% at the NC state level.	✓ Check-points along the way that show whether progress is being made ✓ Legitimate and reasonable plans for scale if successful ✓ Identification of and plan to combat policy barriers ✓ Evidence and research-informed design ✓ Commitment to assessing effectiveness	<u>Teacher/Leader</u> ▪ System support to redesign educator prep, hiring, induction, support, reach, retention at both teacher and school leader levels
REFORM ENVIRONMENT		
What are they and why fund them?	**What do we look for in investment opportunities?**	**Grantee Examples**
TBF understands the impact of policy on education. Successful implementation of direct service and system improvement grants often relies on sound local and state policy. To make smart policy, we need an informed, engaged electorate and well-informed policymakers. Grants in this category CREATE the "content" (recommendations, research) and COMMUNICATE the "content" (inform community of the facts, build advocates, and support decision-makers). These grants fall into the broader "reform" category, which targets 30% in Charlotte and 30% at the NC state level.	✓ Alignment with TBF's view on policy ✓ Credible, solid reputation among peers and decision-makers ✓ Sufficient reach with target audience ✓ Strategic thinking – understands both the "short" and "long" game ✓ Provides a unique value to the policy ecosystem (low duplication in voice or focus) ✓ Research capacity (internal or through partnerships) that ensures recommendations are sound ✓ Influential decision-makers pay attention to them	▪ Commissioned research ▪ Advocacy organizations ▪ Informing stakeholders