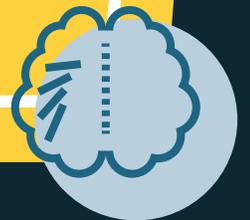




Finding Your Place: The Current State of K-12 Social Emotional Learning



July 2020

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BILL & MELINDA
GATES foundation

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About Tyton Partners



Tyton Partners is a leading strategy consulting and investment banking firm serving the education sector. We partner with clients to assist them in aligning market dynamics and mission objectives to best meet and fulfill their organizational aspirations. Our work covers issues ranging from early childhood through to corporate and workforce learning for a diverse array of companies, non-profit organizations, foundations, institutions, and investors.

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Tyton Partners supports the development of a strong ecosystem of social emotional learning suppliers, intermediaries and policy makers in their work with schools and districts. Any mention of particular frameworks or suppliers in this publication serve to illustrate our observations on the evolution of this market. They do not represent a specific endorsement in any way. Any errors, omissions, or inconsistencies in this publication are the responsibility of Tyton Partners alone.



Executive Summary

Social emotional learning, or SEL, has seen a rapid rise in interest in recent years, as schools and districts seek to leverage its vast benefits to unlock students' academic potential and equip them with the skills to navigate the challenges of life after school. Talk to almost any school or district leader and they will tell you that they “use SEL.” But what does this actually mean in practice? What is the real state of SEL adoption and implementation in schools and districts across the nation? How are teachers and administrators navigating what can be a complex array of practices, processes, school culture, and data in support of social emotional development in students? Now more than ever, schools are on the front lines of addressing challenges that extend far beyond the academic sphere. How do teachers and administrators feel about their own capacity and the support that is available to implement social emotional learning?

In the fall of 2019, Tyton Partners conducted primary and secondary research to better understand the current landscape of K-12 social emotional learning, which included fielding a survey of K-12 district leaders, school leaders, and teachers throughout the U.S. that generated almost 3,000 responses. In this paper, we will shed light on the above questions through five key themes from our research relative to SEL awareness, adoption, availability, and ecosystem health. And we will discuss their implications for schools and districts, SEL funders, and SEL suppliers alike. At the end of the paper, we will explore how the unprecedented COVID-19 virus may affect our original findings, informed by conversations with select district partners, funders, and suppliers carried out in the Spring of 2020.

Specifically, we will answer:

1. What is the current state of SEL adoption and availability in schools / districts?

- » Social emotional learning spans a wide variety of categories and approaches in practice, with schools and districts implementing various combinations of SEL from across a sweeping taxonomy of options that include curriculum, professional development, measurement, and school-culture initiatives
- » Adoption and availability vary significantly among our survey respondents according to the form of SEL considered; for example, 93% of districts adopt some kind of SEL, but only 73% adopt SEL curriculum, and 45% adopt SEL measurement





2. Why are schools / districts adopting SEL?

- » School and district adoption of social emotional learning among our survey respondents is primarily focused on improving student social emotional development, student mental health, and educational equity as opposed to other educational goals such as improvement of academic outcomes



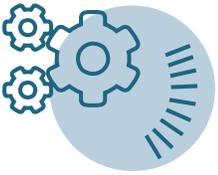
3. How is SEL being implemented in schools / districts?

- » Social emotional learning implementation among schools and districts within our survey clusters into distinct “models” at the K-5 and 6-12 levels
- » Schools and districts in our survey with more widespread SEL adoption over longer periods of time are more likely to utilize integrated models inclusive of more SEL categories from across the taxonomy



4. What are the perceived effects of SEL adoption and implementation?

- » Widespread SEL adoption among survey respondents is correlated with perceptions of improvement and progress on key educational goals, and more integrated SEL implementation models are perceived as making more progress towards an ideal environment than other approaches
- » These *perceptions* of progress must not be confused with *actual impact* on student outcomes but can be signals for further research
- » Research in the field of implementation science tells us that these perceptions can have an important effect on fidelity of implementation and program success



5. How is the broader supplier ecosystem evolving to support SEL adoption and implementation?

- » The SEL supplier ecosystem is relatively immature, but notwithstanding near-term challenges from COVID-19, it is showing signs of evolution in a positive direction as indicated by signals including high market fragmentation and an emerging fundraising and investment environment
- » Given heavy reliance on grant funding, a difficult revenue environment, and a migration among schools and districts towards integrated models, there will be increasing pressure on suppliers to evolve their business models in order to achieve sustainability



6. What impact is COVID-19 likely to have on the SEL ecosystem?

- » With states projecting significant revenue shortfalls in the upcoming year, there is a good chance that overall K-12 and SEL specific spend are likely to decline
- » Financial pressures on district budgets could cause SEL to be deprioritized; alternatively, we could see an acceleration of SEL adoption as the pandemic has created heightened awareness of the importance of student social emotional well-being
- » Suppliers reliant on program service revenue from districts are more likely to be challenged in the near-term, shifting the overall supplier revenue mix towards grant funding

Call to Action



School and District Leaders

- » Recognize that while adopting social emotional learning in any form is preferable to not doing so, that alone is insufficient; SEL must be adopted and implemented in a fashion that more fully addresses the social emotional needs of students and teachers
- » Acknowledge the benefits of social emotional learning relative to not just social emotional development and mental health, but *all* educational goals, including academic outcomes

SEL Funders

- » All SEL is not the same; focus on proving and funding more effective SEL offerings and implementation models
- » Consider using mental health and educational equity as entry points for encouraging adoption of SEL, given that schools and districts are already doing so in practice
- » Conduct further research to determine if SEL's perceived effect on educational environments relative to areas such as mental health, equity, and school climate can be proved objectively
- » Suppliers with typically more sustainable business models reliant on district spending are especially challenged given the unique dynamics of COVID-19; funders should explore providing bridge loans to help these suppliers through for the long-term benefit of the ecosystem

SEL Suppliers

- » Create new offerings across categories and approaches so as to better meet school and district needs of implementing SEL in an integrated fashion
- » Explore creative partnerships that enable alignment between offerings across different categories such as curriculum and measurement or professional development and change management
- » Seek to develop more sustainable revenue models less reliant on philanthropic funding to facilitate longevity and scale

Survey Approach

The 2019 Tyton Partners K-12 Social Emotional Learning survey elicited 2,910 responses in total, including 1,513 school administrators and staff, 582 district administrators and staff, and 727 teachers. The survey targeted a nationally representative sample of roles across each of these three groups. The response rates for major respondent types include: Guidance Counselors (5%), Teachers (4%), School Psychologists (4%), Principals (1%), and Superintendents/Assistant Superintendents (1%). In addition to these titles, we surveyed 15 roles across schools and districts inclusive of Curriculum Directors, Social Workers, and Special Education Directors. The survey was in the field from October 23, 2019 to November 6, 2019. The survey intentionally skews towards larger districts and 9-12 schools compared with the general U.S. distribution. Due to respondent dynamics, the survey also has a slight skew towards rural respondents, low-poverty schools, and school psychologists. Additional analysis conducted across these various demographic dimensions indicates that sample skews have limited, if any, impact on the key findings in the paper.

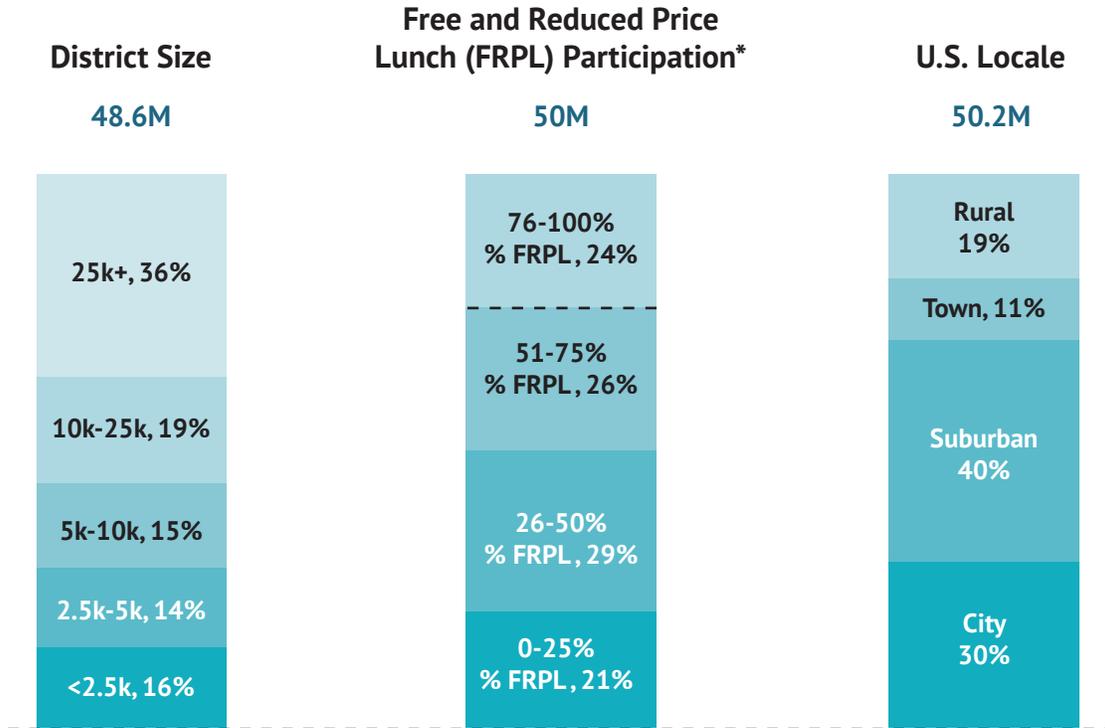
The majority of data in this paper is discussed relative to three groups:

1. Teachers and school administrators exclusively focused on some combination of grades K-5, often labeled as “Schools K-5”
2. Teachers and school administrators exclusively focused on some combination of grades 6-12, often labeled as “Schools 6-12”
3. District leaders focused across grades K-12, often labeled as “Districts K-12”

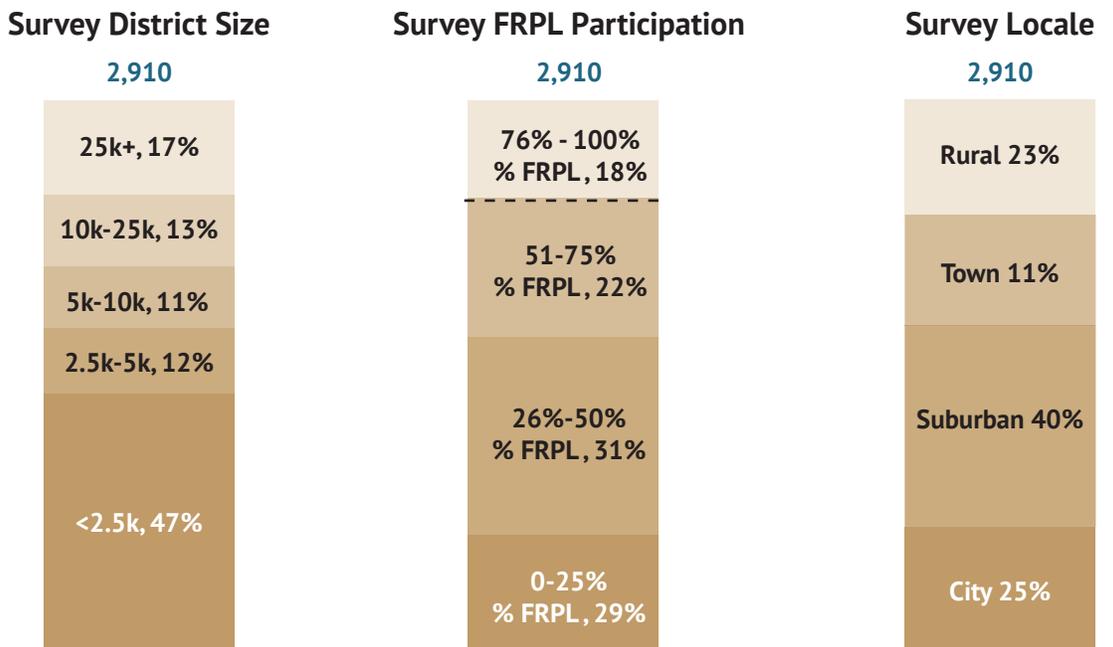


U.S. and Survey Demographic Data

U.S. Public School Students, 2016-2017 (NCES)



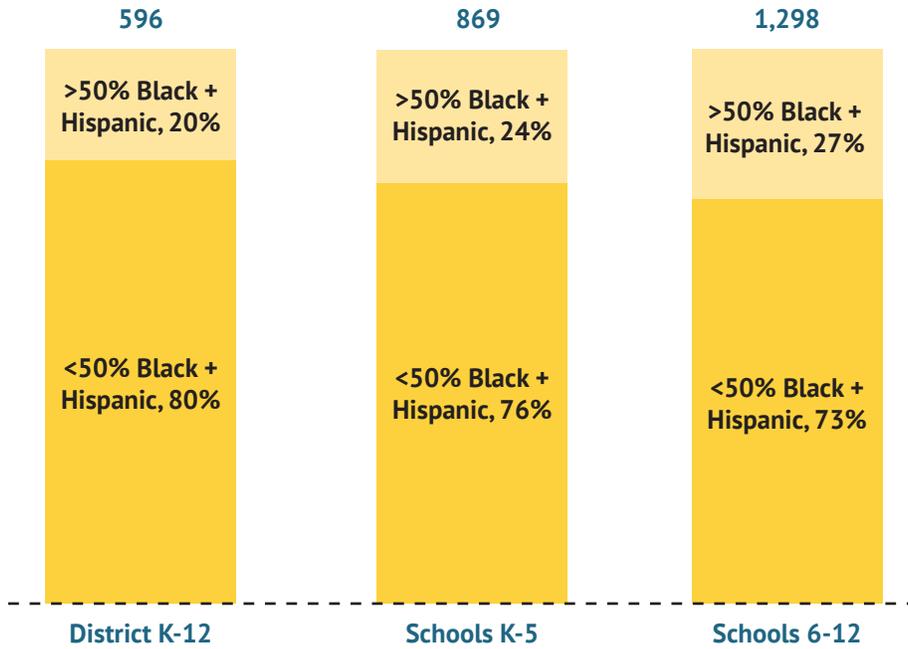
Survey Demographic Data



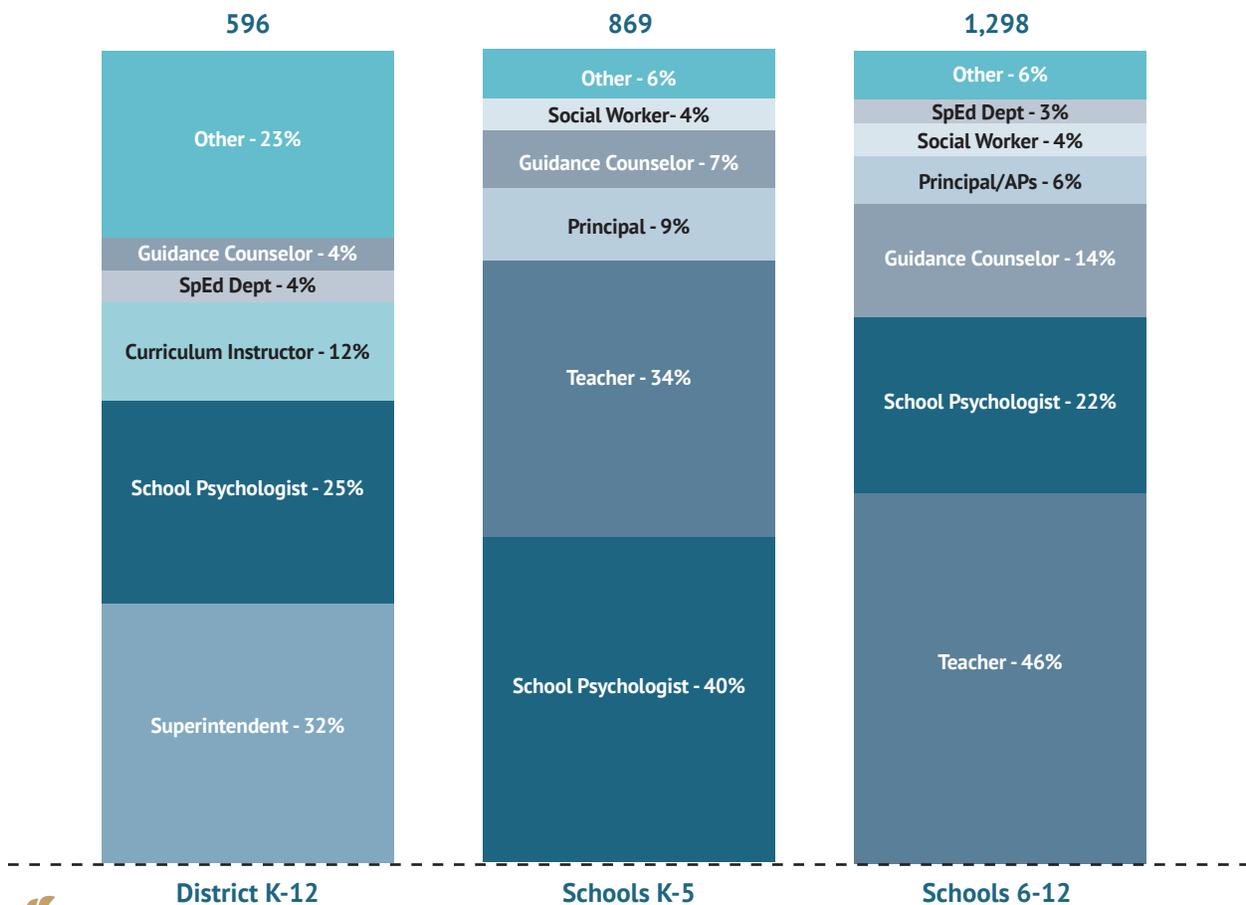


Survey Demographic Data

District Race by School / District Level

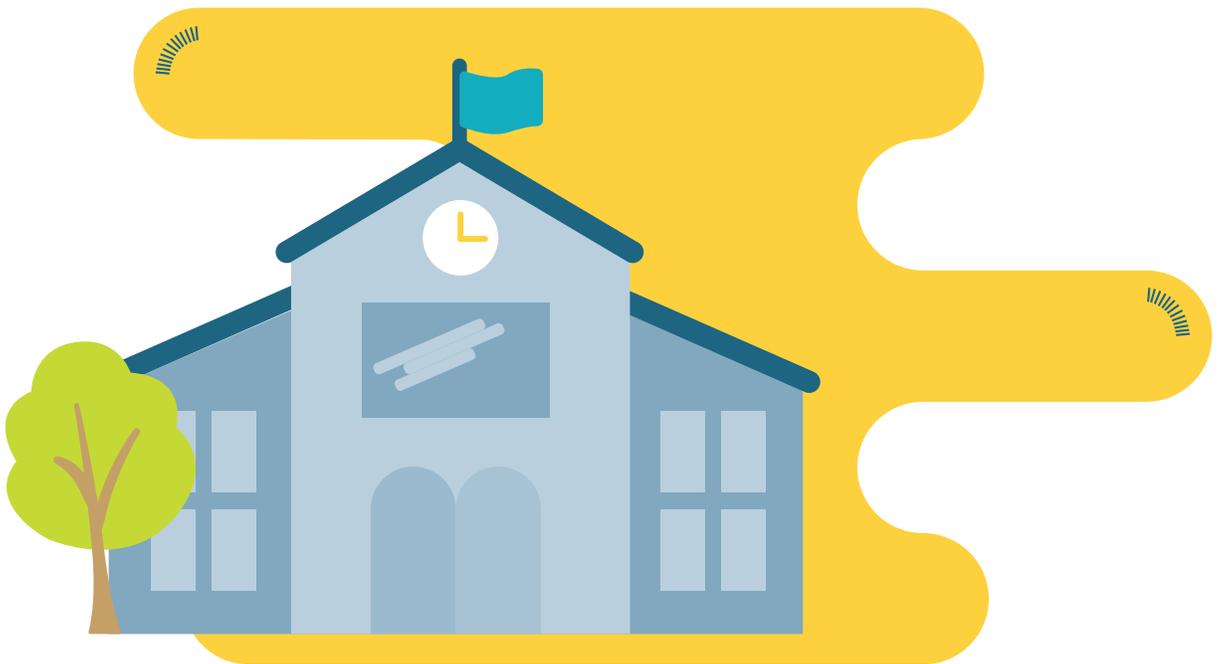


Role by School/District Level



Based on the full response set, the 95% confidence interval is +/- 4% for questions asked of respondents at the district level, +/- 3.3% for questions asked of respondents for schools in grade levels K-5, and +/- 2.7% asked of respondents for schools in grade levels 6-12. Questions that were addressed to a smaller subset (e.g., smaller demographic subsets of the population or those with a specific implementation profile) have wider confidence intervals.

For key findings in the paper, we conducted additional analyses along demographic lines by role (Psychologists, Principals / APs, Teachers, Guidance Counselor and other), race (respondents from districts with >50% Black and Hispanic populations and respondents from districts with <50% Black and Hispanic populations), and percentage of students eligible for free and reduced price lunch (FRPL) (low-poverty schools, schools with <25% of students eligible for FRPL, and high-poverty schools, schools with >75% of students eligible for FRPL). As mentioned above, our overall findings across the sample are largely consistent for each demographic segment. In fact, many of our conclusions are amplified for high-poverty schools and schools from majority Black and Hispanic districts. These additional analyses can be viewed in the Appendix of the paper.



I. What is the current state of SEL adoption and availability in schools / districts? //////////////

Key findings:

- ▶ Three broad approaches to SEL: Standalone-skill-building, embedded learning, and school-wide programs and practices
- ▶ SEL offerings span five categories: curriculum, professional development, measurement, change management, and technical assistance
- ▶ SEL *in some form* is nearly universal among districts
- ▶ Districts report higher levels of SEL adoption than individual schools, on average



Social emotional learning can take many forms, from informal practices to formalized programs. Typically, when schools and districts decide to get serious about SEL, they will develop or adopt more formal programs or practices. While all generally focus on improving student social emotional development, these programs and practices can be quite different. When adopting SEL, one district may choose an anti-bullying curriculum, another a professional development workshop on how to implement social emotional practices, and yet another a school-wide survey on school climate. Some may adopt all three. Talking with school and district leaders, teachers, researchers, funders, and suppliers, one thing is clear: in practice, social emotional learning spans a wide variety of categories and approaches, with schools and districts implementing various combinations of SEL from across a sweeping taxonomy of options.



K-12 SEL Taxonomy Illustrates Available Range of Categories and Approaches

Figure 1.1 on the following page illustrates our view of this taxonomy, segmenting SEL strategies across five SEL categories and three SEL approaches. SEL categories (e.g., curriculum, professional development) are aligned with traditional education segments. SEL approaches (e.g., standalone skill-building, embedded learning) denote distinct methodologies for incorporating SEL into school settings. For example, with standalone skill-building SEL curriculum, students may have dedicated SEL instruction focused on developing competencies such as social awareness or a growth mindset. Embedded SEL curriculum may take the form of a history lesson that teaches the benefits and strategies for building resilience and includes opportunities for collaborating with peers. And a school wide SEL curriculum program may call for daily greetings of students and dedicated time and strategies for student and teacher relationship building throughout the week. Note that for the technical assistance category, there is no delineation between SEL approaches because technical assistance is concerned with working at the school or district level to determine the forms of SEL that should be adopted, and how they can best be implemented.



Figure 1.1: K-12 SEL Taxonomy

Note: Logos are of providers with core offerings illustrative of the designated square. They are meant to facilitate understanding, not provide a comprehensive view of provider offerings. Many of these providers have offerings spanning multiple squares in the taxonomy, not depicted here.

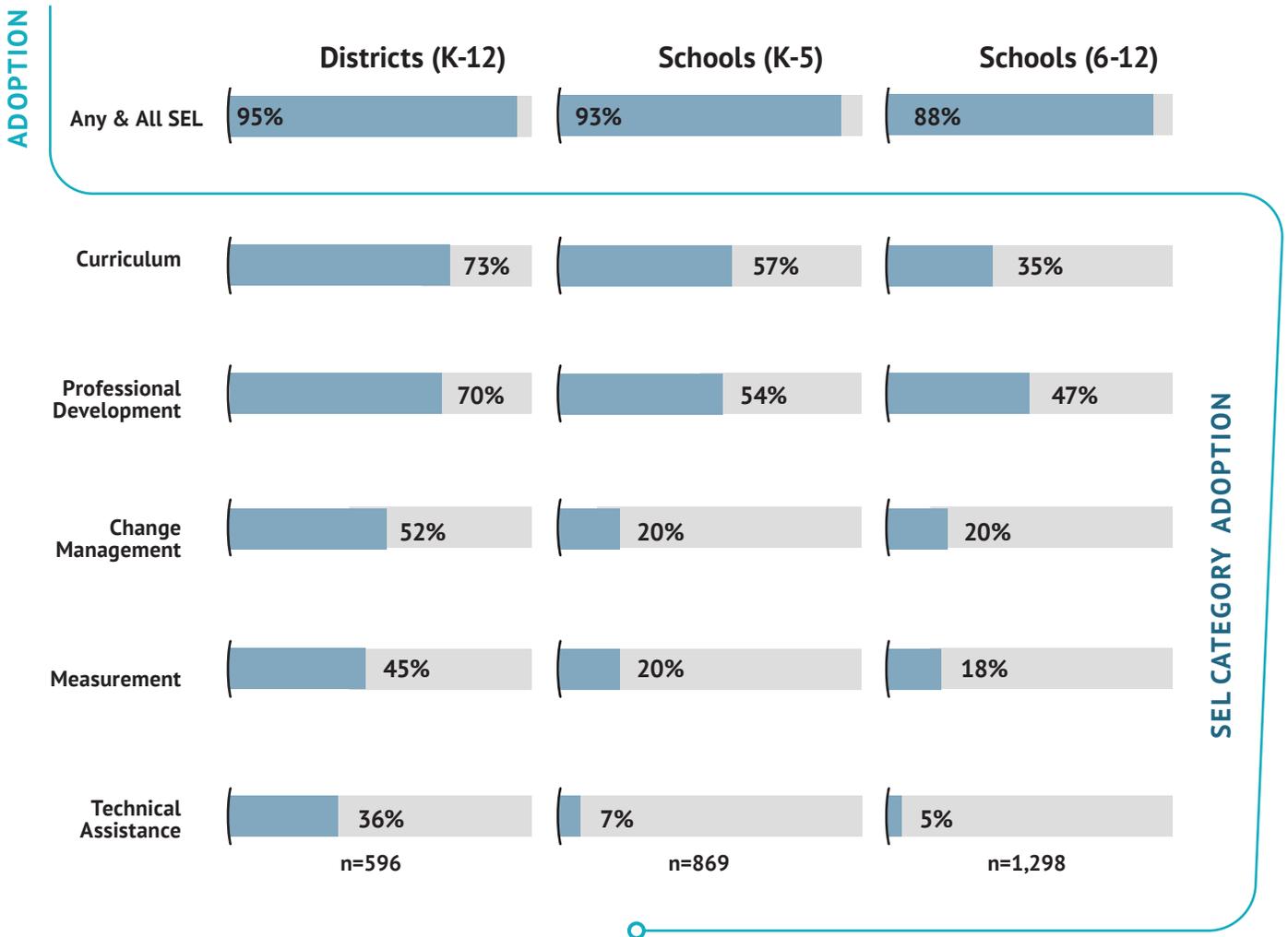




High Adoption of “Any” SEL, but Less So Across Specific SEL Categories

Our survey indicates, as demonstrated in *Figure 1.2* below, that SEL is adopted in “any capacity” at 93% of surveyed schools in grades K-5, 88% of schools in grades 6-12, and 95% of districts across all grades K-12. But adoption across specific categories, such as SEL curriculum or SEL measurement, is more limited. Professional development and curriculum represent the most adopted categories across all groups, while measurement and technical assistance are the least adopted.

Figure 1.2: SEL District and School Adoption by Product Category



Notably, districts are reporting significantly higher levels of SEL adoption than are schools, implying that when a district “adopts” SEL, it is not necessarily being used by all schools within that district. Additional analysis along demographic lines displayed that SEL adoption rates were largely similar between high-poverty and low-poverty districts. Similar results were found when comparing majority Black and Hispanic school districts and non-majority Black and Hispanic school districts.

Key Implications:

▶ All SEL adoption is not equal; schools and districts have a wide variety of options for SEL

▶ Adoption of SEL change management, measurement, and technical assistance has substantial room to grow

▶ Districts must work to limit any adoption shortfall among schools within their district



II. Why are schools / districts adopting SEL? //////////////

Key findings:

■ SEL is most often used as an initiative to address student social emotional development, mental health, and/or educational equity

■ For those who do not use SEL, primary barriers to adoption include lack of clarity around implementation and insufficient funding

■ SEL is more likely to be used as an initiative for social emotional development than behavioral interventions such as PBIS or academic interventions such as leveled reading



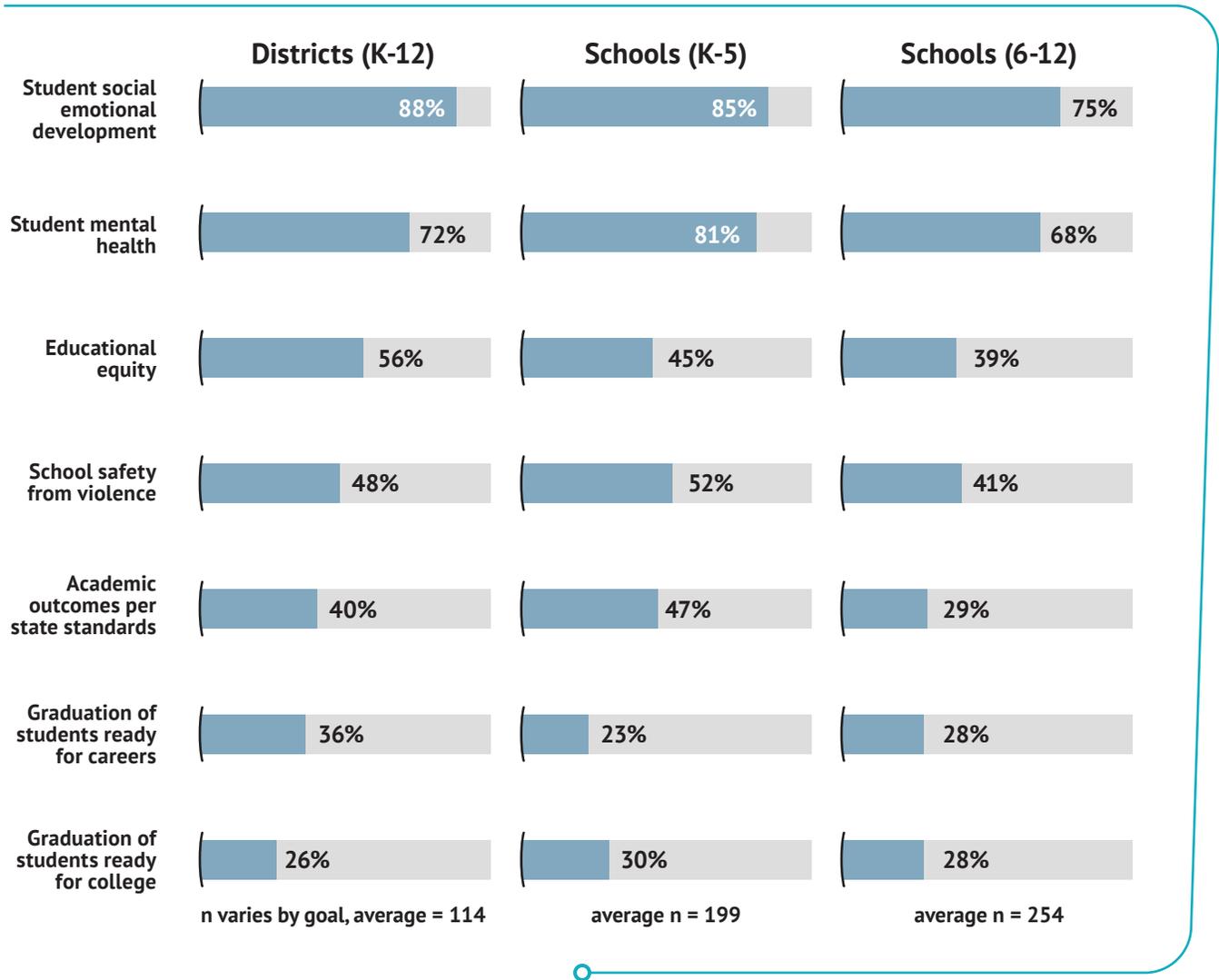
Essential to understanding the variation in SEL adoption across schools and districts is the impetus behind why educators and administrators adopt SEL at all. SEL has gained national attention and popularity as the media have focused on high profile cases of school violence, cyber-bullying, and other societal issues. Our findings suggest that SEL is not seen as a reactive intervention to these high-profile problems but as an intervention with more foundational purposes. Are schools and districts adopting SEL to improve student academic outcomes? To prepare students for post-secondary success? Or to ensure a safe school environment and address student mental health? We asked respondents to identify all specific interventions or initiatives being implemented to address seven educational goals including:

1. School safety from violence (external or self-inflicted)
2. Graduation of students ready for college
3. Graduation of students ready for careers
4. Academic outcomes per state standards
5. Student mental health
6. Student social emotional development
7. Educational equity (racial and socioeconomic)

SEL is Primarily Adopted for Student Social Emotional Development and Mental Health

As the evidence suggests in *Figure 2.1* below, SEL is most readily used as an intervention for student social emotional development (85% in K-5, 74% in 6-12, and 88% in districts) and student mental health (85% in K-5, 75% in 6-12, 88% in districts). SEL is less often used as an intervention for addressing academic outcomes, particularly among grades 6-12 in schools (29%).

Figure 2.1 : % of Respondents Using SEL as an Initiative to Address the Specific Educational Goal



The high usage rates as a mental health initiative suggest an opportunity to encourage increased focus on SEL among schools concerned about mental health issues such as student and teacher anxiety. Also notable is that 56% of district respondents indicate that they are using SEL as an initiative to address educational equity. Low rates of adoption as an academic intervention may indicate that schools and districts are not fully aware of, or not bought into, the evidence linking SEL and academic outcomes. Or if they are bought in, it may not be with enough conviction to act upon it. This should serve as a call to funders and suppliers in particular that this messaging may need to be improved and the evidence base may need to be strengthened.

In addition to SEL, educators and administrators are using other methods such as behavioral interventions (e.g. Positive Behavior Interventions and Supports) and subject-specific interventions (e.g. leveled reading) to advance student social emotional development and mental health. This suggests that SEL may be used alongside - or even serving to displace - some of these more traditional interventions in the schools where it is being adopted. Further research is necessary to understand if that is indeed the case and if it is worthwhile based on outcomes.

Among schools and districts that do not use SEL, the primary barriers to adoption include a lack of clarity on how to start implementing SEL and insufficient funding, indicated by 44% and 34% of district respondents, respectively. These may present an opportunity for technical assistance and change management to help lead the way in increasing adoption.

Key Implications

► Stakeholders encouraging SEL adoption may increase odds of success by:

- » Focusing on student mental health as an entry point
- » Improving the messaging and evidence base around SEL's proven effect on academic outcomes

► Promotion of technical assistance and change management may help schools and districts to reduce barriers to more widespread SEL implementation



III. How is SEL being implemented in schools / districts? //////////////

Key findings:

▶ Observation of three distinct SEL implementation models in K-5

▶ Observation of four distinct SEL implementation models in 6-12



We now know what types of SEL are being adopted and why SEL is adopted at all. But how is it actually being implemented in schools and districts? And why does implementation matter?

A young girl named Susie sits in her sixth grade English class. She is struggling with the writing assignment at hand – her mind is clearly elsewhere. Her teacher, familiar with the benefits of social emotional learning, knows Susie has been struggling lately with issues outside of school. She has Susie pivot to a reflective writing exercise, and it is a helpful start in processing her feelings while still improving her writing. But next period, Susie is late for her math class and immediately receives a detention – it is her third tardy this week. Susie’s detention causes her to shut down, and placing her head on her desk, she refuses to start any work. Her frustrations have been exacerbated and she falls further behind on her schoolwork.

Now imagine a different scenario, where Susie still shows up late to math. But this teacher too, is aware of Susie’s distress and addresses her tardiness without giving her a detention.

Susie’s classmates are learning about empathy and a few of them offer her support. And Susie herself has been learning how to become more self-aware of her emotions during difficult times and working to better handle them in school. She apologizes for being late, thanks her teacher and classmates for understanding, and goes on to have a good experience in class.

Not all adoption of social emotional learning is the same. While approximately 95% of school districts adopt social emotional learning in some capacity, only 25% of districts in K-5 and 8% in 6-12 adopt deeply integrated models that are more likely to produce the environment described in our second scenario above. While there is much to be excited about with the state of social emotional learning and its burgeoning popularity, the depth of implementation really matters and there is much room for improvement.



In order to determine from the survey data if schools and districts are indeed implementing different types of SEL in distinct patterns across K-5 and 6-12, we used a clustering methodology called latent class analysis. The explanatory variables for the analysis come from the SEL taxonomy: SEL category used (e.g., curriculum, professional development, measurement, change management, TA) and SEL approach (e.g., standalone skill-building, embedded learning, school-wide programs and practices). The analysis combines school and district data. The analysis points to three distinct SEL implementation models in K-5 and four in 6-12.

Below are overviews of the implementation models across both K-5 and 6-12. Overviews include descriptive information and data points across a variety of key characteristics for each model including: SEL category and approach dynamics, the percent of widespread implementation, and demographic information. They also highlight the % of respondents in each model who indicated that a dedicated SEL department or school / district-level SEL standards were a top factor in successful SEL implementation. These characteristics serve to paint a picture of the distinctions between each model.

Table 3.1: K-5 SEL Implementation Models

	 Strong Core	 Balanced Curriculum	 Measurement First	Average
% of K-5	25% (n=145)	53% (n=307)	23% (n=135)	—
SEL category	Strong adoption across SEL curriculum, PD, and measurement	High adoption of SEL curriculum, moderate, adoption of SEL measurement	High adoption of SEL measurement	—
SEL approach	Slight preference for standalone skill-building approach	Balanced use of SEL approaches	Slight preference for standalone skill-building approach	—
Widespread implementation*	72%	63%	39%	60%
Length of implementation	3.3 years	2.5 years	2.2 years	2.6 years
Have a dedicated SEL department	30%	22%	20%	23%
School/district SEL standards**	30%	30%	21%	28%
Free and reduced-price lunch student population	41%	45%	47%	45%
Black and Hispanic student population	35%	24%	29%	29%

*Widespread refers to implementation in most classrooms in a school and/or most schools in a district.

**Displaying % of respondents indicating school / district SEL standards was a top 3 factor contributing towards a successful SEL implementation

Users of the *Strong Core model*, represented in 25% of schools and districts in K-5, are more likely to adopt offerings across all five SEL categories compared with users of other implementation models. They are also more likely to display widespread implementation of SEL, and have been implementing SEL for almost a year longer. The most used model in K-5 is the *Balanced Curriculum model*, used by 53% of schools and districts, characterized by high curriculum use and a balanced use of SEL approaches. Users of the *Measurement First* model, as the name implies, focus on adoption of SEL measurement at the expense of other categories. They tend to have lower widespread implementation than others (39%) and have had SEL for a shorter period of time (2.2 years on average). Notably, the free and reduced-price lunch student populations across all three models range between 41% and 47%, demonstrating limited income level variance.

Table 3.2:
6-12 SEL
Implementation
Models

	 Integrated SEL	 Dedicated PD	 Measurement First	 Curriculum First	Average
% of 6-12	8% (n=105)	24% (n=454)	35% (n=481)	33% (n=335)	—
SEL category	Very strong adoption across all SEL categories	High adoption of SEL professional development	Moderate adoption of SEL measurement; lags in adoption of other categories	Moderate adoption of SEL curriculum; lags across other categories, esp. PD	—
SEL approach	Preference for school-wide programs and practices	Preference for standalone and school-wide approaches	Preference for school-wide programs and practices	Strong preference for school-wide programs and practices	—
Widespread implementation*	69%	50%	31%	38%	41%
Length of implementation	3.3 years	2.7 years	2 years	2.2 years	2.3 years
Have a dedicated SEL department	38%	19%	16%	13%	17%
School / district SEL standards**	31%	27%	23%	24%	25%
Free and reduced-price lunch student population	40%	45%	43%	44%	44%
Black and Hispanic student population	25%	27%	31%	31%	29%

*Widespread refers to implementation in most classrooms in a school and/or most schools in a district.

**Displaying % of respondents indicating school / district SEL standards was a top 3 factor contributing towards a successful SEL implementation

Users of the *Integrated SEL* model, implemented in just 8% of 6-12 schools and districts, are more likely to adopt offerings across all five SEL categories compared to other models. Users of no other model show above average adoption across more than two categories, but for *Integrated SEL* we see it across all five at very high levels. Users are also 28% more likely to implement widespread SEL vs. the average, have been implementing SEL for a full year longer, and are 21% more likely to have a dedicated SEL department. The other three implementation models are closely aligned to specific SEL categories. While users of *Dedicated PD* show above average adoption of SEL PD, users of *Measurement First* and *Curriculum First* show closer to average adoption of SEL curriculum and SEL measurement, respectively. Users of *Dedicated PD* also show above average levels of widespread implementation and length of implementation. Free and reduced-price lunch student populations range from 40%-44%, implying similar socioeconomic conditions across all four models.

Interestingly, the *Measurement First* model is used by those with the shortest history of SEL implementation, and the lowest percent of widespread implementation. *Integrated SEL* users have the longest history of implementation and the highest percent of widespread implementation. It bears the question if this represents a progression where new users of SEL start with the *Measurement First* model and over time, move towards a more integrated implementation. However, further research must be done to be able to say whether or not that is indeed the case. In the next section, we will revisit the implementation models and explore differences among perceptions of progress.

Key Implications:

- ▶ SEL implementation is often characterized by adoption across a variety of SEL categories and approaches
- ▶ Schools and districts with more widespread SEL implementation, who have had SEL over a longer period of time, tend to prefer more integrated models of SEL
- ▶ In contrast, those with more limited and newer implementations of SEL prefer models prioritizing SEL measurement
- ▶ Further research should be conducted to determine if models represent an evolution towards more integrated forms of implementation



IV. What are the perceptions of impact and general sentiments for SEL implementation?

Key findings:

- ▶ Widespread SEL adoption is correlated with improved perceptions of progress towards an ideal environment across seven educational goals
- ▶ The Strong Core model in K-5 and Integrated SEL model in 6-12 are perceived as making more progress towards an ideal SEL implementation when compared to other implementation models
- ▶ Implementation science research indicates that perceptions of impact have a tangible effect on quality and fidelity of implementation and therefore program outcomes



When it comes to interventions in educational settings, the feelings and attitudes of the practitioners on the ground actually implementing them can oft be overlooked. In a field predicated on emotional awareness, it seems particularly prudent that we do not make this mistake. In our survey, we sought to understand feelings and attitudes practitioners have with respect to their school or district's achievement of specific higher-order goals such as student social emotional development or equity, and their school or district's SEL implementation, whatever form that may take. We did this by asking respondents to:

1. Self-assess their school or district's progress towards an ideal environment for each of seven educational goals on a scale from 0-100%
2. Self-assess their school or district's progress towards an ideal SEL implementation on a scale from 0-100%

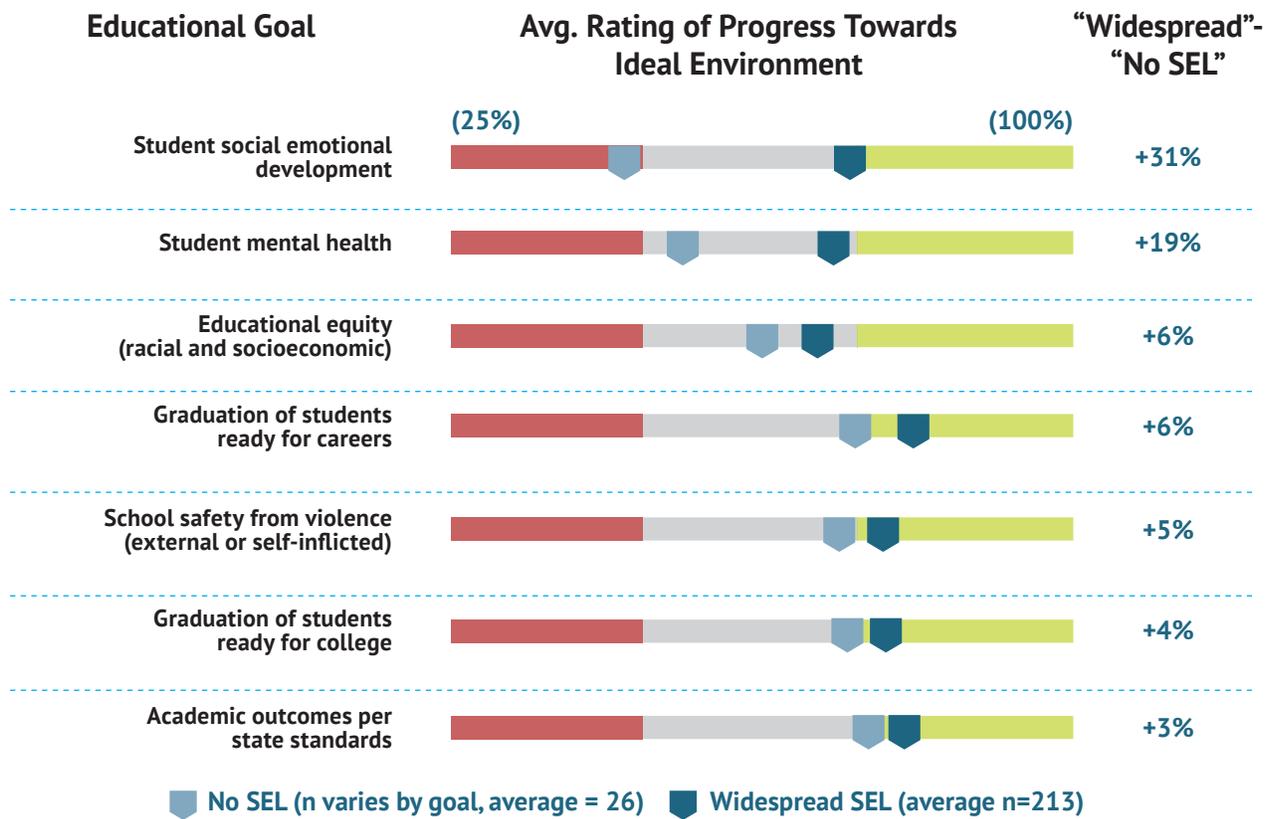
For each issue measured, these serve as relative measures of practitioner confidence in their school's approach, somewhat analogous to popular sentiment indicators such as the Consumer Confidence Index. This methodology allows us to measure sentiment with respect to fairly complex issues and systemic interventions. Other methods, such as Net Promoter Score (NPS), work well with discrete services that have a clear beginning and end, but complex issues such as these do not lend themselves well to that approach. Still, it should be understood that these measures are only attitudinal and are not indicative of actual gains on specific academic or non-academic indicators. We can also expect that self-perceptions are likely to be overinflated; the absolute ratings are thus less telling than are the relative ratings between respondents and the various groupings presented here.

Several studies in the field of implementation science^{1,2,3,4} draw a connection between practitioner confidence in education interventions and intervention outcomes. For example, a study at Johns Hopkins University⁵ found that if teachers believe an intervention is beneficial, they will be more likely to implement it with fidelity, with real implications for program outcomes. Thus, while perceptions may not be indicative of actual outcomes, they can have a real impact on actual outcomes.

Widespread SEL Adoption Correlates with Higher Perceptions of Progress in Student Social Emotional Development and Student Mental Health

After asking respondents to rate their school or district's progress towards an ideal environment relative to specific educational goals, we asked whether they implemented SEL on a *limited* basis (some schools in a district, some classrooms in a school), on a *widespread* basis (most schools in a district, most classrooms in a school), or not at all. Those indicating they implemented SEL on a widespread basis indicated higher ratings of progress towards an ideal environment across **all seven educational goals** on average compared to those with no SEL. Student social emotional development and student mental health displayed the largest ratings difference, with **+31** percentage points and **+19** percentage points, respectively, in districts. Similar findings were seen for K-5 and 6-12 in schools (see additional graphs in the appendix).

Figure 4.1 : Difference in self-reported progress towards ideal environment between districts that implement SEL on widespread basis and those without SEL

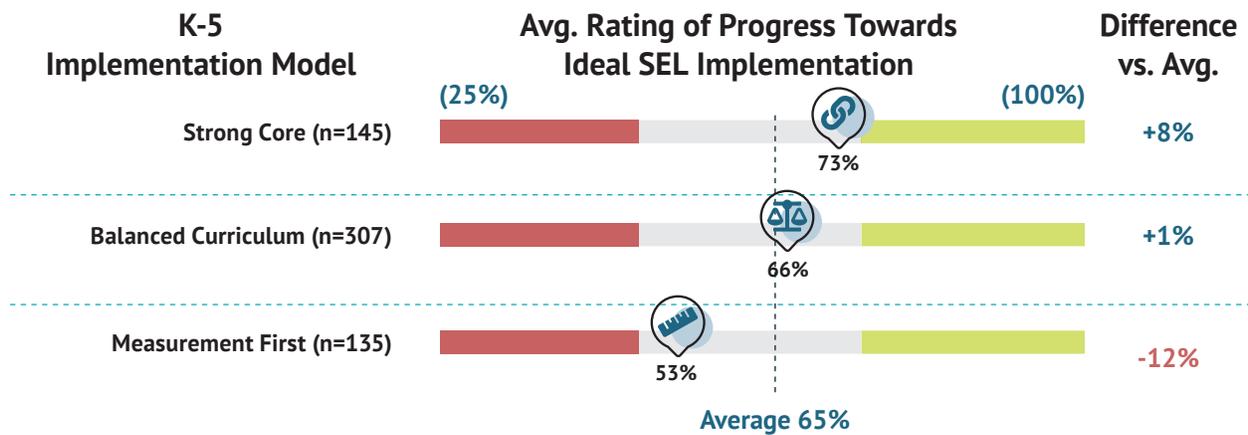


The correlations do not prove that SEL is the cause of these perception differences. More research is required to understand the causal connection, if any, between SEL implementation and perceptions of progress. However, if the data is indeed representative of a causal connection, it may have implications for the staying power of SEL initiatives enacted in support of those goals. It is also worth noting that perception differences were even more pronounced among high-poverty and majority Black and Hispanic schools.

Strong Core Model in K-5 and Integrated SEL Model in 6-12 are Correlated With Higher Perceptions of Progress of Overall SEL Implementation

In *Figure 4.2* below, we see respondent ratings of their school or district’s progress towards an ideal SEL implementation for users of each of the different models described in Section III for K-5:

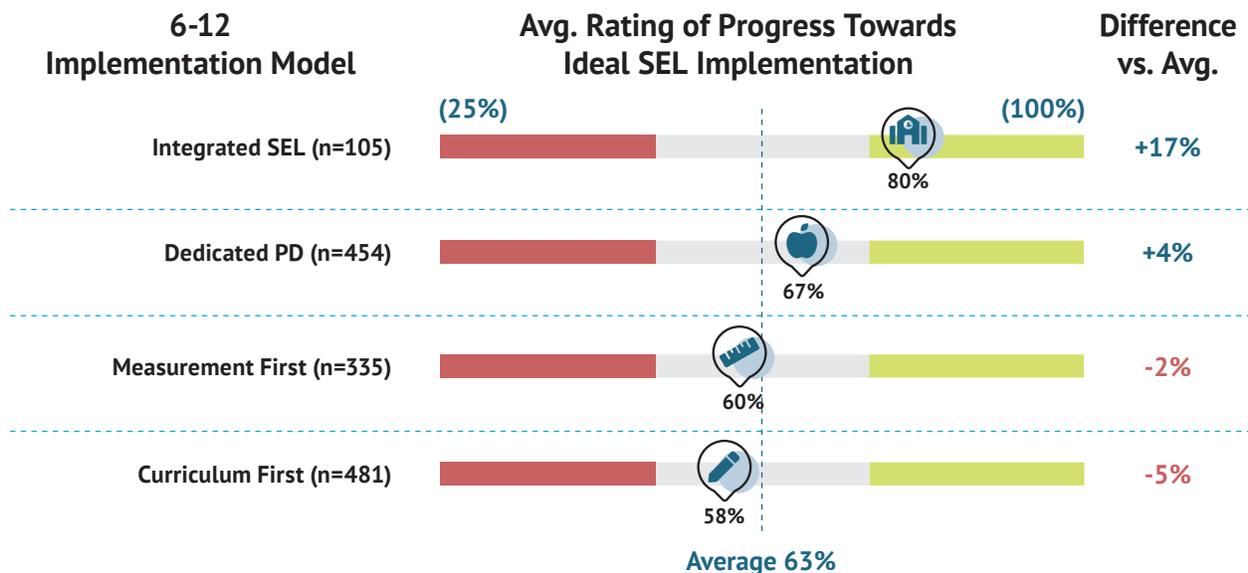
Figure 4.2 : Do you agree or disagree that your school or district is making progress towards an ideal implementation of SEL?



Users of the *Strong Core* model, characterized by strong adoption of SEL curriculum, PD, and measurement, on average rated progress towards the ideal as 8 percentage points higher than the average across all models. Users of *Balanced Curriculum* only rated progress 1 percentage point higher than the average, while users of *Measurement First* rated progress as 12 percentage points less than the average.

The differences are even more stark when we look at ratings for 6-12 implementation models, as depicted in *Figure 4.3*:

Figure 4.3 : Do you agree or disagree that your school or district is making progress towards an ideal implementation of SEL?



Here we see that users of *Integrated SEL* rate their progress towards an ideal implementation an incredible **17** percentage points higher than the average. Users of *Dedicated PD* rate progress as 4 percentage points above average, while users of the other two models rate progress as slightly below average. In Section III, we saw that *Integrated SEL* tends to be used by those with more widespread implementation, that has been occurring for longer, among those more likely to have dedicated SEL departments. And here we see that the perceived progress of their implementation is significantly higher than all other models.

Again, these ratings do not allow us to say that *Integrated SEL* is definitively better than other models as they do not prove objective effectiveness. But per the implementation science research noted above, they do suggest that *Integrated SEL* is more likely to be implemented effectively than other models where the perceived effects are not as pronounced. And they do indicate that further research is warranted to prove if these subjective perceptions of ideal SEL implementation are representative of objective outcomes.

Key Implications:

► The positive perceived effects of SEL in our data may prove helpful in encouraging the adoption and successful implementation of SEL by others

► Implementation models perceived as more effective, such as *Strong Core* and *Integrated SEL*, are more likely to be implemented with fidelity than models that are perceived as less effective

► Further research should be pursued to determine if perceived effects of *Strong Core* and *Integrated SEL* models are representative of actual outcomes

► Positive school and district perceptions of the *Integrated SEL* model should incentivize suppliers to expand their set of offerings across categories



V. How is the broader supplier ecosystem evolving to support SEL adoption and implementation? //////////////

Key findings:

- ▶ As of November 2019, SEL represented a ~\$530M market in terms of school and district spend
- ▶ Over 50% of spend focused on SEL in grades K-5
- ▶ Notwithstanding near-term challenges from COVID-19, the SEL supplier ecosystem appears to be immature, yet showing signs of evolution



As of November 2019, SEL represented a ~\$530M market in terms of school and district external spend. Spending is most prevalent in K-5 (52% of grade level spend), school-wide practices (39% of SEL approach spend), and change management (52% of category spend). The market includes a wide variety of different types of organizations including for-profits and non-profits, curriculum, assessment, technology and service providers. Our research identified over 100 organizations across the various types of providers. A full breakdown of spend can be found in the appendix. As we'll discuss in the next section, in light of the economic fall-out from the COVID-19 pandemic, we expect this external spend to be significantly impacted in AY 2020-2021.

The “health” of the supplier ecosystem is an important factor in the continued evolution of the SEL field, as schools and districts are heavily reliant on the use of external interventions in the implementation of SEL. We have identified five key measures to indicate SEL ecosystem health and rated the state of each according to the rubric below.

Figure 5.1 : SEL Supplier Health Rubric

Criteria	Metric	Health Rating*			
		Low	Emerging	Moderate	High
Market Fragmentation	Share of players dominating the market; presence of suppliers with moderate market share competing and gaining traction in the space	One or two dominant suppliers; no suppliers gaining traction	Some dominant suppliers or small suppliers gaining traction	Some dominant suppliers <i>and</i> small suppliers gaining traction	Many suppliers with moderate share, with some emerging leaders
Fundraising and Investment	% of schools surveyed citing “not enough funding” as top reason for not implementing SEL	>40%	20-40%	10-19%	<10%
Revenue Mix	% of revenue coming from program service fees (as opposed to grants or contributions)	<20%	20-40%	41-60%	>60%
Reach and evidence	For reach: widespread adoption of SEL solutions; for evidence: % of providers rated as “SELECT” by CASEL	Both metrics <33%	Either rating or reach between 33 - 66%, the other <33%	Both metrics 33 - 66%	Both metrics >66%
Presence of scale players	Number and reach of Technical Assistance players; share of major K-12 players investing in the SEL space	Few large players and few TA providers	Major players entering SEL or emerging TA ecosystem	Major players entering SEL <i>and</i> emerging TA ecosystem	Major players investing significantly and established TA ecosystem



SEL Supplier Ecosystem is Immature, but Evolving

The SEL supplier ecosystem is relatively immature, but is showing clear signs of evolution in a positive direction as indicated by signals including high market fragmentation and an emerging fundraising and investment environment. However, as we will discuss further in the following section, COVID-19 does present some near-term challenges.

- 1. Market Fragmentation (High):** Analysis of individual SEL suppliers shows a highly fragmented marketplace; only two suppliers have a market share greater than 10%, and none greater than 25%. This level of fragmentation indicates healthy competition and enough demand to support a wide variety of players, but in more mature markets we would expect to see leading providers to have more dominant market share positions.
- 2. Fundraising and Investment (Emerging):** 26% of school respondents surveyed indicated that “not enough funding” is a top reason why they are not currently implementing SEL. Grantmaking dedicated to SEL, however, has grown from \$3M in 2010 to ~\$40M in 2018 and SEL-related investment deals have followed an upward trend. This suggests that funding mechanisms, while growing, are not yet mature enough to support all districts.
- 3. Revenue Mix (Moderate):** Prior to the onset of COVID-19, SEL supplier revenue was a healthy mix between program service revenue (42%) and grants (58%). Most program service revenue came from standalone skill-building and embedded learning offerings, with school-wide and technical assistance providers heavily reliant on grant funding. In a truly mature market scenario, we would hope to see these numbers switch, with closer to 60% of revenues coming from program revenues, a more sustainable revenue source in our opinion.
- 4. Reach and Evidence (Emerging):** SEL approach has a significant effect on reach, as standalone skill-building offerings have been able to scale much more quickly than time intensive school-wide programs. Evidence base as denoted by CASEL (Collaborative For Academic, Social, And Emotional Learning), as an “arbiter of quality” has clear impact on reach and scale. We are seeing decent proof of the existence of both scaled and quality SEL, which is encouraging, but as the market matures, we would expect to see a significant increase in offerings along both dimensions.

- 5. Presence of Scale Players (Moderate):** Major K-12 players who turned their attention to SEL in 2019 include ACT, who acquired Mawi Learning and McGraw-Hill, who partnered with Sesame Workshop to launch a PreK-6 Literacy curriculum. This displays the market is becoming robust enough for large players to enter the space, which will eventually decrease market fragmentation and increase scale of prominent offerings.

As the ecosystem evolves, so will each of these five factors. The current health of the ecosystem, in tandem with the findings we have reviewed earlier on in this paper, hold a number of implications for SEL suppliers.

Key Implications:

▶ The above dynamics, alongside a difficult revenue environment and an increasing focus on integrated offerings, may incentivize increased mergers, acquisitions, and/or partnerships

▶ With grants representing 58% of revenues (or higher during the aftermath of COVID-19), SEL suppliers will need to evolve their business models to achieve sustainability



VI. What impact is COVID-19 likely to have on the SEL ecosystem?

Key findings:

 Overall K-12 and SEL specific spend are likely to decline with states projecting significant revenue shortfalls for the upcoming school year

 Suppliers reliant on program service revenue from districts are likely to shift near-term funding to grant dollars, as districts decrease spending

 SEL adoption may accelerate as addressing student trauma is a necessary first step in addressing learning loss and increasing student engagement



As the nation grapples with the unprecedented effects of COVID-19, it is worth exploring the potential effects of the crisis on the aforementioned findings from our research. Ultimately, nobody can predict with certainty how SEL in schools and districts will be affected over the coming months and additional research should be pursued. But in order to gain a better understanding of the current dynamics and emerging perspectives on the potential impact, we conducted primary and secondary research, including conversations with 10+ thought leaders in the SEL space from foundations, research organizations, and providers, who have been in close contact with schools and districts. The following commentary is informed by that research. As opposed to fundamentally altering any of the dynamics surfaced in our initial research, it is more likely that COVID-19 affects the overall rate of change and development in the SEL ecosystem.



An Inflection Point for Social Emotional Learning?

Those in the field see the pandemic as shining a light on social and emotional issues among students and teachers alike that are becoming increasingly harder to ignore in our current reality. As the transition to remote learning in the Spring of 2020 has given teachers, principals and other administrators a deeper and different window into home lives of their students (and for students, a deeper look into the home life of their teachers), the social and emotional factors impacting students' learning and teachers' teaching have been laid bare. Providers are seeing an influx of new interest from schools in dire need of guidance on how to cope with the emotional challenges of remote learning and social isolation, better manage stress and anxiety, and build engagement among their students. Looking to the year ahead and according to those we interviewed, schools are particularly focused on how they will address the learning loss that occurred in the spring of 2020. Many in the SEL field insist that learning loss cannot be overcome without SEL to help children re-engage, overcome the trauma created by the pandemic, and create a learning environment supportive of the whole child. Whereas in the past, SEL needs were considered distinct from and secondary to academics, now schools and districts may more readily embrace the idea that they are part and parcel to academic achievement. If this indeed occurs, the 2020-2021 school year could see an acceleration in the growing adoption of SEL. To this point, a recent survey by the RAND corporation on COVID-19's effect on K-12 schools found that 68% of teachers believe supporting students' social and emotional well being will be a higher priority next school year compared to this most recent school year. Similarly, it found that 58% of principals believe that enacting new social emotional learning interventions or initiatives will be a higher priority during next school year⁶.

Alternatively, financial headwinds caused by the pandemic could prove to neutralize or even overpower an increasing awareness of SEL's importance. With many districts facing significant budget cuts in the upcoming school year, adoption of new offerings may prove difficult. Even if school and district leaders would like to adopt SEL offerings, they may decide that they simply cannot afford to for now. This could mean SEL adoption stays flat, or even declines, if more recent adopters decide to deprioritize SEL relative to more established initiatives.

“Schools were never designed to address trauma to this degree, and we are in a place where the evidence is irrefutable that we need to change.”

– President, Non-profit organization delivering technical assistance services related to SEL



Near Term Challenges for SEL Supplier Ecosystem

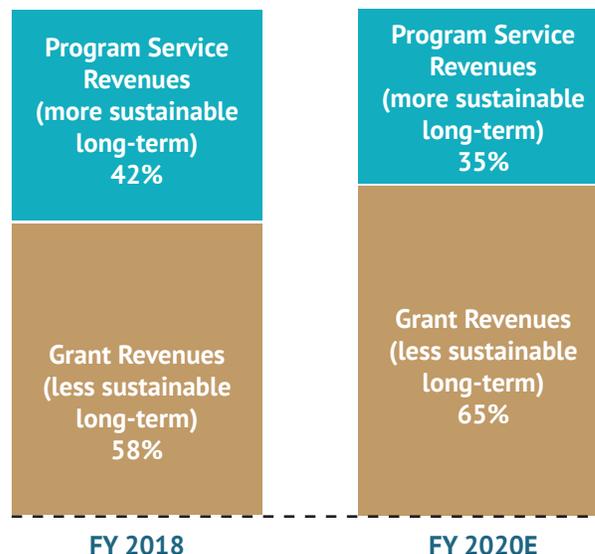
As financial uncertainty for the upcoming school year jeopardizes districts' capacity to invest in SEL, it also presents real challenges for SEL suppliers themselves. Approximately 90% of K-12 education funding comes from state and local sources, and the average district today is more reliant on state funding than in past decades. In the face of declining consumer spending and rising unemployment, which means less sales and income tax revenue for states, states are releasing new revenue projections signaling significant shortfalls for the year ahead⁷. And federal funding appears to be insufficient to offset district budget shortfalls. This suggests a potential decline in overall K-12 spend and therefore a decline in SEL spend during the upcoming school year. And it could have detrimental effects on supplier revenue mix ecosystem wide.

“Spending on SEL will depend on how we advocate for SEL with the right people at the right level and how we show up within the model.”

– Executive Director, Non-profit organization delivering SEL professional development

While some suppliers expect a steady year, others are anticipating as much as 25% or higher declines in revenue. Those more reliant on program service revenues, as opposed to grant funding, are more likely to experience challenges, driven by cuts in district spending. Our initial supplier analysis, based on 2018 figures, indicated that 42% of supplier revenues came from program service revenues, a level we defined as “moderate,” yet still short

SEL Supplier Revenue Mix



◀ In this scenario, suppliers more reliant on program service revenues will suffer in the short-term, despite being more sustainable over the long term.

Funders can help these suppliers to weather the short-term for the long-term sustainability of the ecosystem.

25% decline in program service revenues, grant revenues unchanged

of an ideal “high” of 60%. In the upcoming school year, the overall revenue mix appears likely to meaningfully shift in the direction of grant funding. Despite the advantages of grant funding in this unique circumstance, program service revenue is more sustainable in the long run. As such, this will create a challenging near-term environment for many SEL suppliers, until they can restore program service revenues to normal levels. Those who are the most agile, innovative, and able to deliver the most value to districts in a cost-effective manner will be most likely to come out on top.

One silver lining of near-term challenges could be increased incentives for partnerships and/or consolidation among suppliers. In such a fragmented supplier ecosystem, this could lead to a coalescing around more sustainable providers with scale and infrastructure advantages. If those providers take advantage of the opportunity by improving the quality and effectiveness of their offerings, it could be to the benefit of the field.

“We recognize an intense exacerbation of the equity issues that were already high priority for our districts, in terms of the vulnerable and those who are most affected by this. It seems the understanding of SEL has never been more pronounced.”

– Vice President, Non-profit research organization focused on SEL

Key Implications:

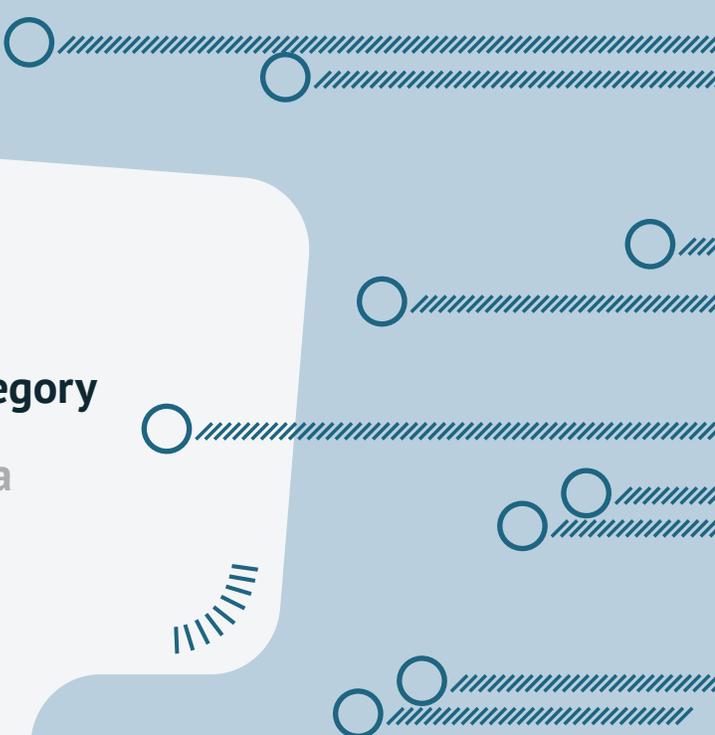
► Funders, providers and champions of SEL need to demonstrate the value of SEL relative to the costs, in addressing student trauma during a time rife with challenges

► Suppliers should consider how the situation creates opportunities to deepen partnerships with schools and districts while their core programs and implementation models must change



Endnotes

1. [Frontiers in Education: Why Is Implementation Science Important for Intervention Design and Evaluation Within Educational Settings?](#)
2. [Quality Matters: Implementation Moderates Student Outcomes in the PATHS Curriculum](#)
3. [SAMSHA: Implementation Science and Practice in the Education Sector](#)
4. [Programme implementation in social and emotional learning](#)
5. [Teachers' Responses to Success for All: How Beliefs, Experiences, and Adaptations Shape Implementation](#)
6. [RAND: COVID-19 and the State of K-12 Schools](#)
7. [National Conference of State Legislatures COVID-19 Revenue Projections](#)

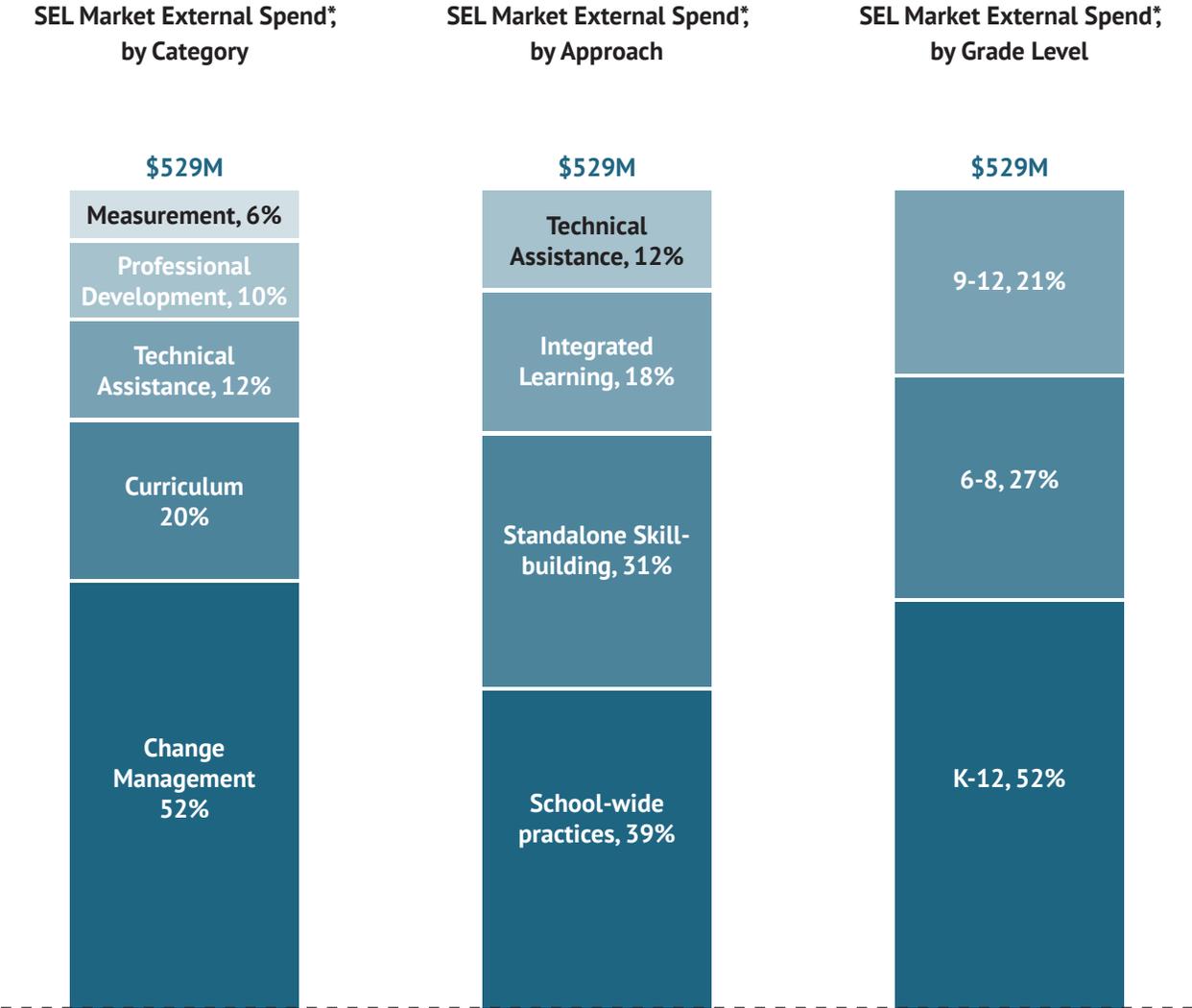


Appendix

Section 1: Detail by SEL Category

**Section 2: Demographic Data
and Analysis**

SEL is a highly fragmented \$530M market based on external spend by schools and districts



*Primarily reflects external spend, though some categories may include limited school/district spend on internally developed SEL resources.

Note: These estimates are Pre-COVID, and do not reflect market changes since March 2020

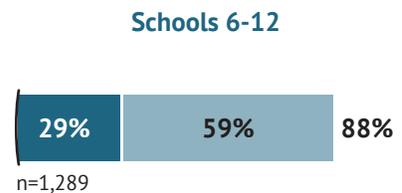
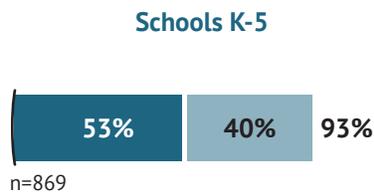
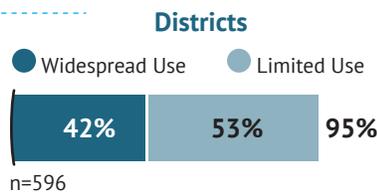
SEL has 99% awareness and 95% adoption in districts; widespread use at 42% with CASEL as top source of information

Overview

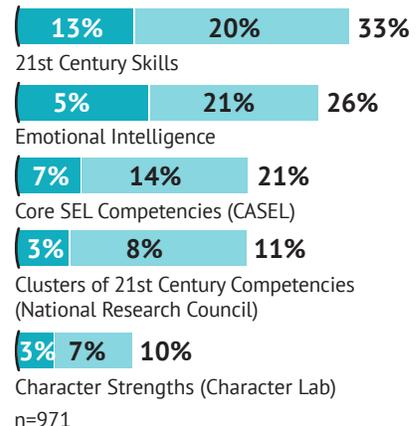
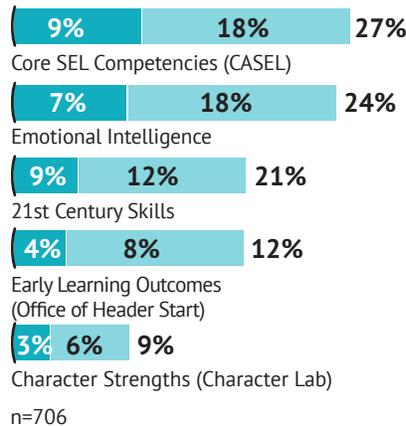
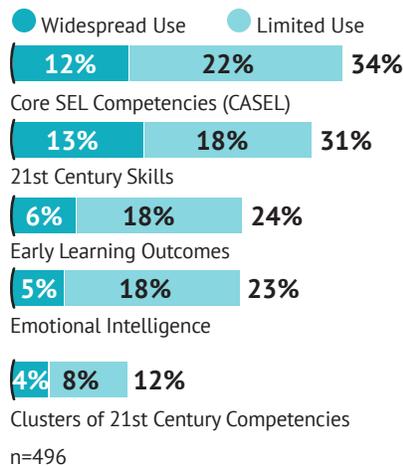
Definition: Social emotional learning is broadly defined as the process through which children and adults understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions.

Market Size: \$529M

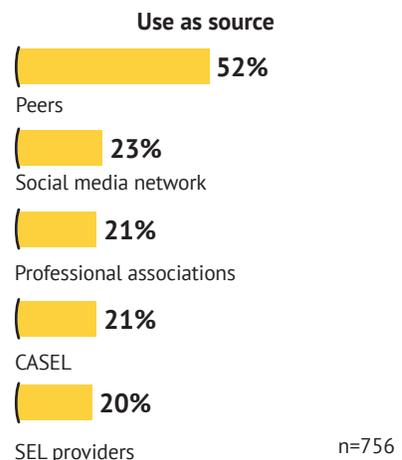
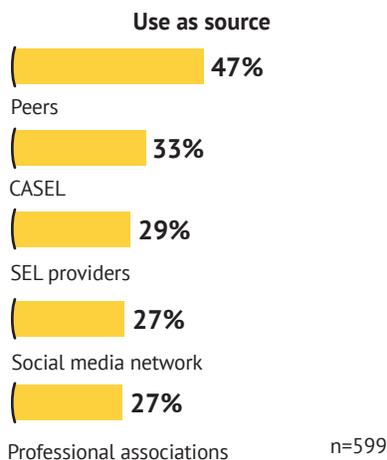
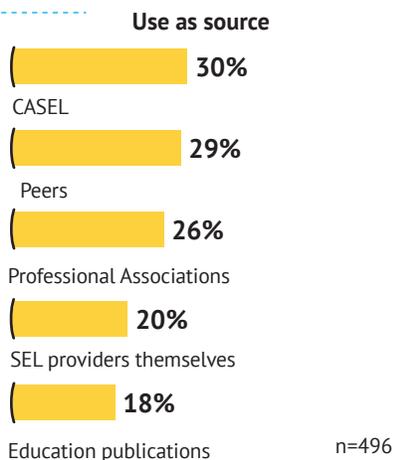
Adoption



Top 5 SEL Frameworks (% of SEL Users)



Top 5 Info Source



SEL Curriculum is a \$105M market with 73% district adoption and 57% K-5 school adoption and 35% 6-12 school adoption

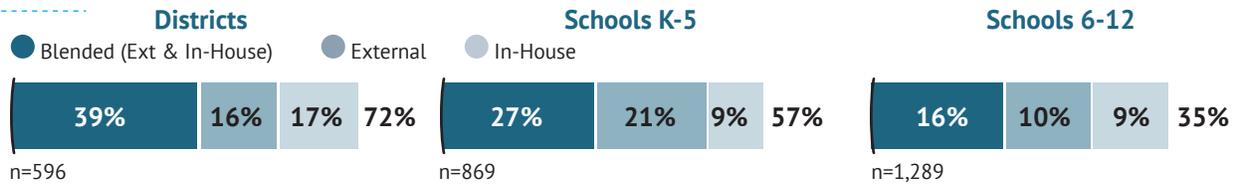
Overview

Definition: Refers to SEL courses, lessons or practices delivered in a school, whether they are standalone courses focused on specific SEL competencies, core academic curricula with intentionally integrated SEL components, or practices in and outside of the classroom guiding SEL-related school-wide behavior.

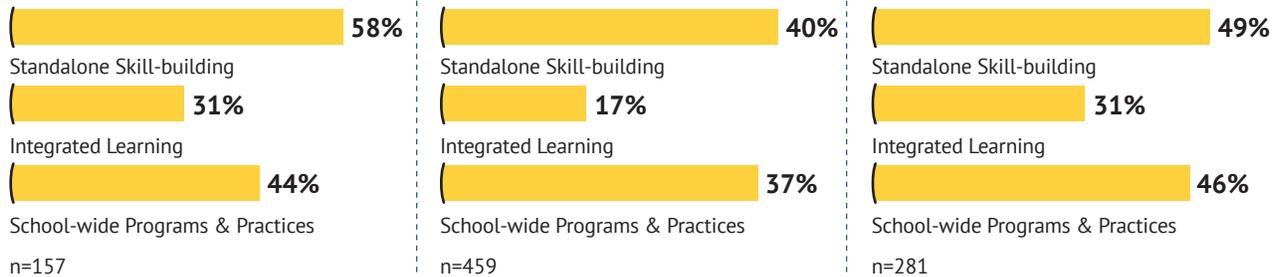
Market Size: \$105M

Annual Spend (Average): \$6.80 per student

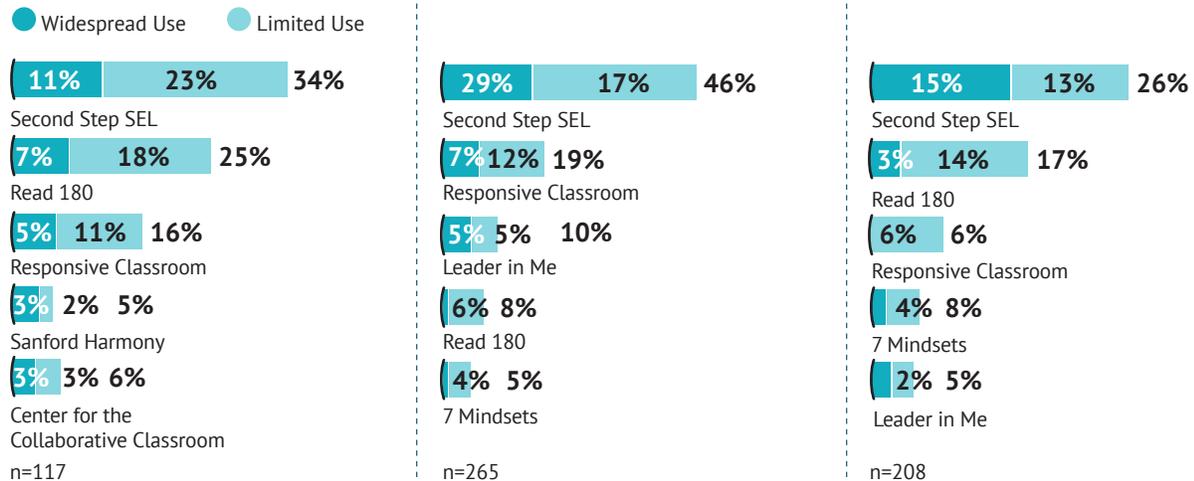
Adoption



SEL Approach



Top 5 Suppliers
(% of external curric. users)



SEL Professional Development is a \$51M market with 70% district adoption and 54% K-5 school adoption and 47% 6-12 school adoption

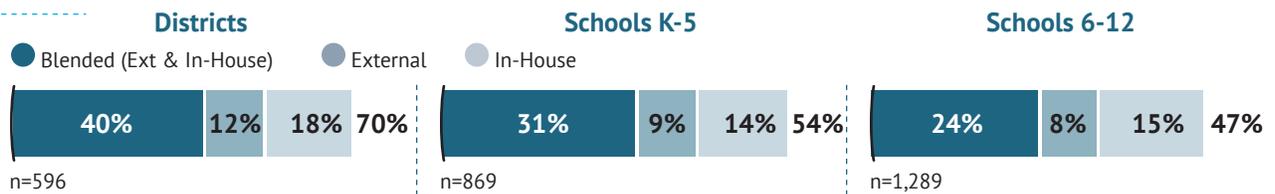
Overview

Definition: Refers to teacher training with a formal focus on SEL, whether related to the ability to teach SEL content in the classroom, teachers' own personal SEL development, or training on school-wide behaviors or practices

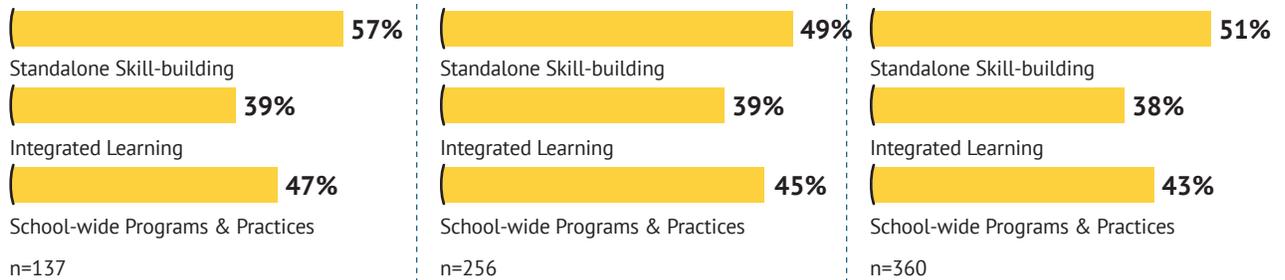
Market Size: \$51M

Annual Spend (Median): \$50.00 per educator

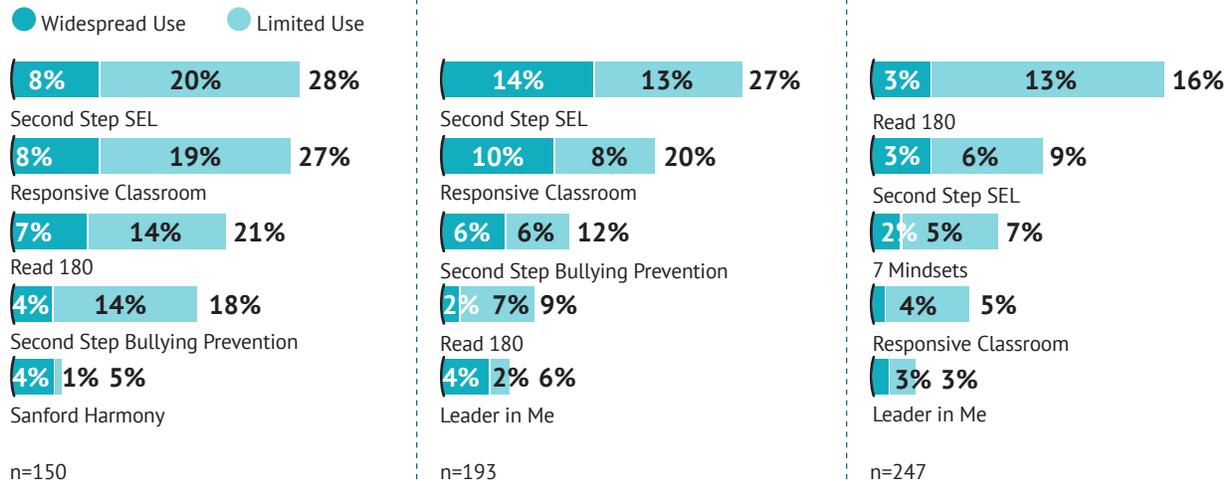
Adoption



SEL Approach



Top 5 Suppliers
(% of external PD users)



SEL Measurement is a \$32M market with 52% district adoption and ~20% K-5 and 6-12 school adoption

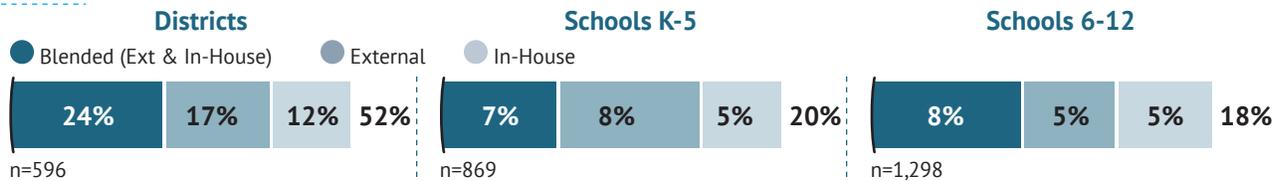
Overview

Definition: Refers to those measurement tools, such as surveys or assessments, used explicitly to gauge status or progress on SEL-related activities, whether focused on students, teachers/classrooms, or on school climate or safety

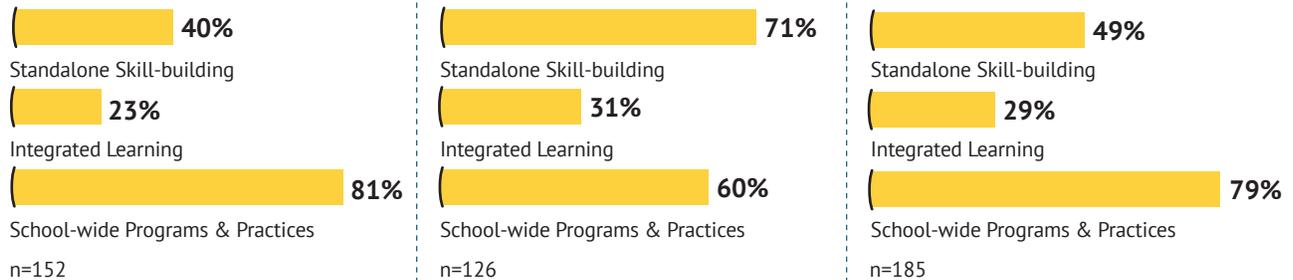
Market Size: \$32M

Annual Spend (Median): \$5.00 per student

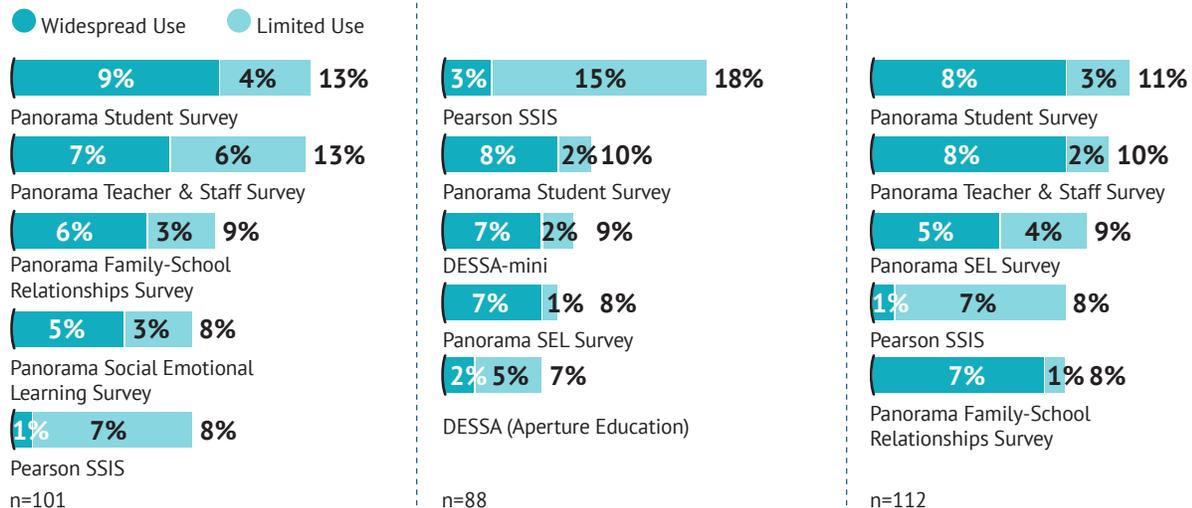
Adoption



SEL Approach



Top 5 Suppliers
(% of external meas. users)



SEL Change Management is a \$276M market with 45% district adoption and 20% school adoption

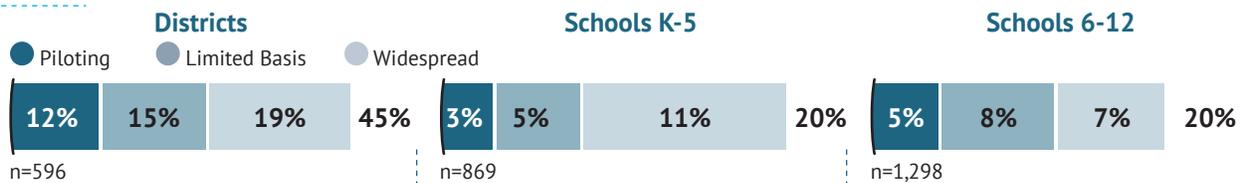
Overview

Definition: Refers to comprehensive, school-wide approaches to SEL including a combination of SEL curriculum, professional development, and/or measurement, often requiring multi-year contracts, and sometimes including significant implementation support from the provider

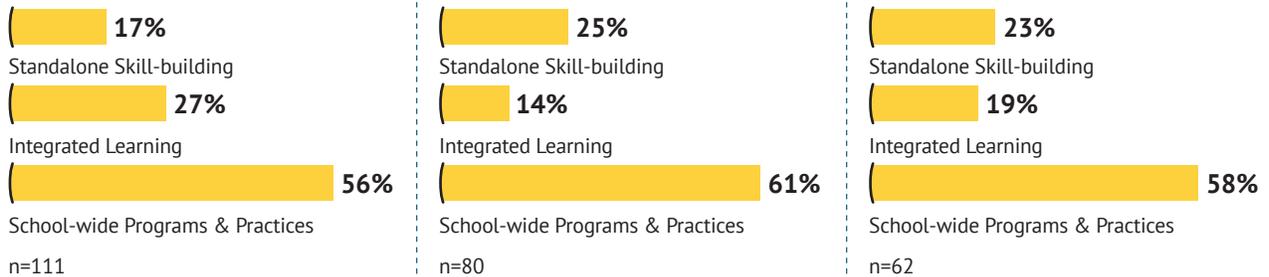
Market Size: \$276M

Annual Spend (Average): \$21,930 per school

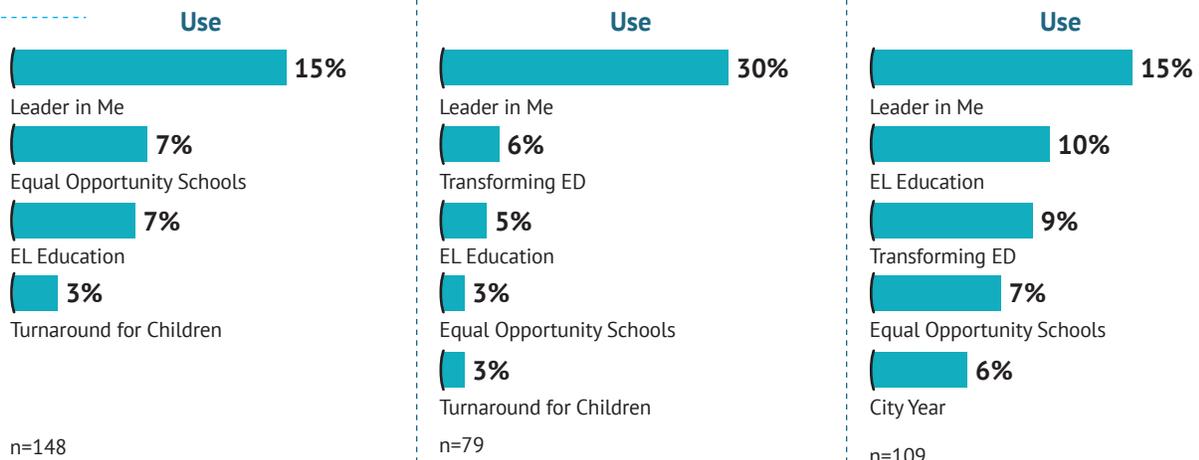
Adoption



SEL Approach



Top 5 Suppliers
(% of change management users)



SEL Technical Assistance is a \$65M market with 36% district adoption and 6-7% school adoption

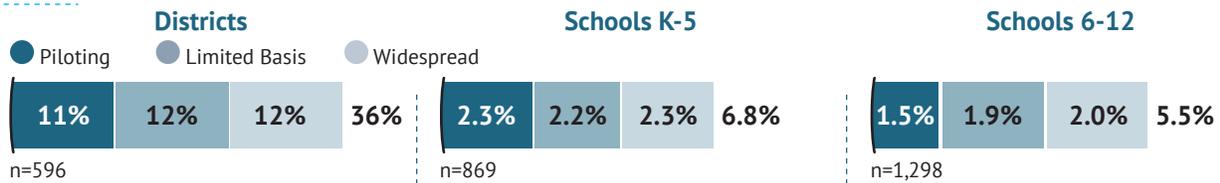
Overview

Definition: Refers to those organizations providing SEL-related research, tools, evaluation, and/or project management help with implementing SEL across schools and districts

Market Size: \$65M

Annual Spend (Average): \$4,586 per school

Adoption



Adoption Drivers

Why did your district decide to use Technical Assistance?

- “To add capacity”
- “To support implementation”
- “Needed outside support”
- “Did not have the in-house expertise”
- “To help us choose SEL curriculum product”

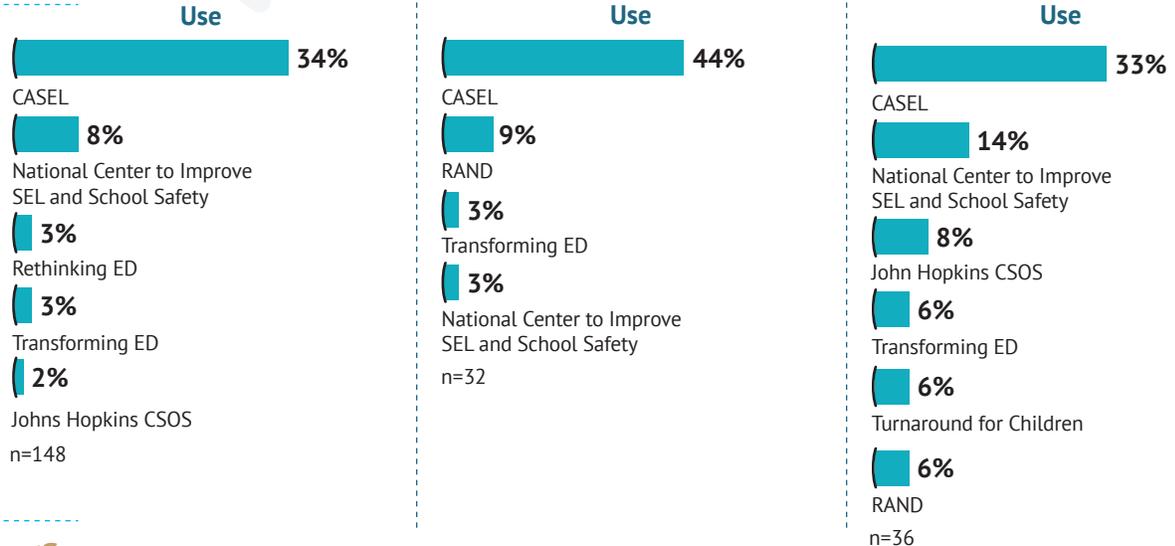
Why did your district decide to use Technical Assistance?

- “We needed to restructure our leadership team processes.”
- “To be able to implement research based SEL programs with fidelity and be able to monitor data”

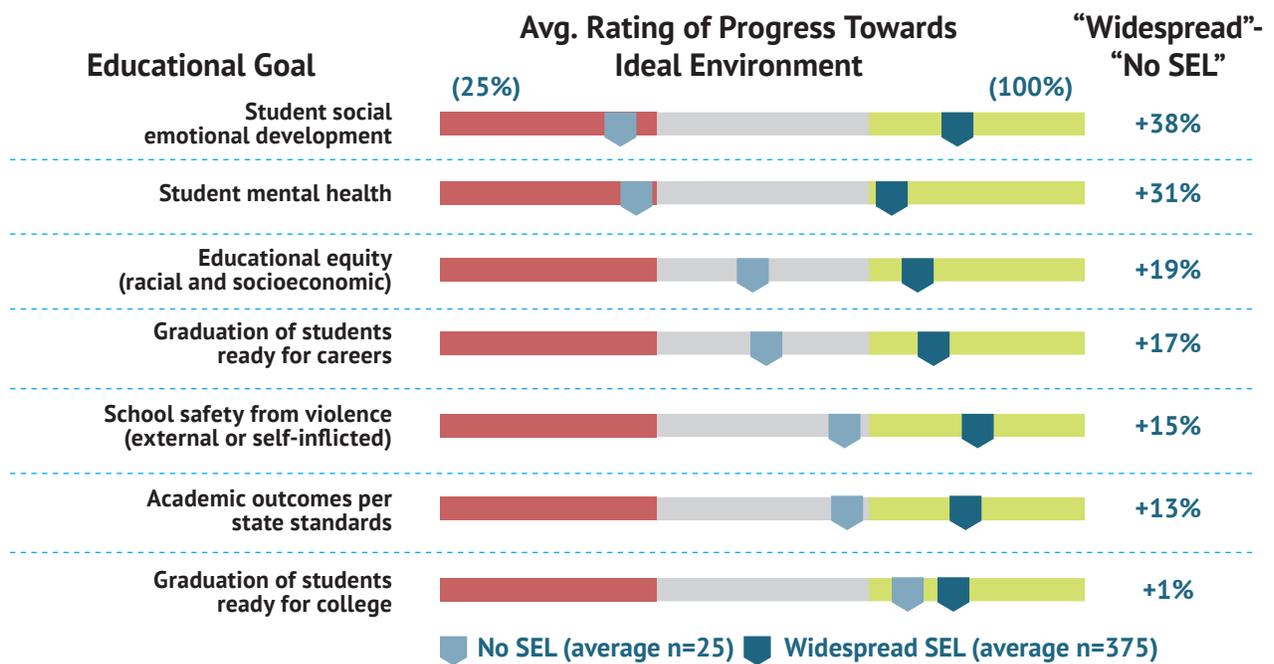
Why did your district decide to use Technical Assistance?

- “To help ensure fidelity.”
- “To decrease the bullying, suicide and other targeted areas that affect our students.”
- “To gain extra support for students.”

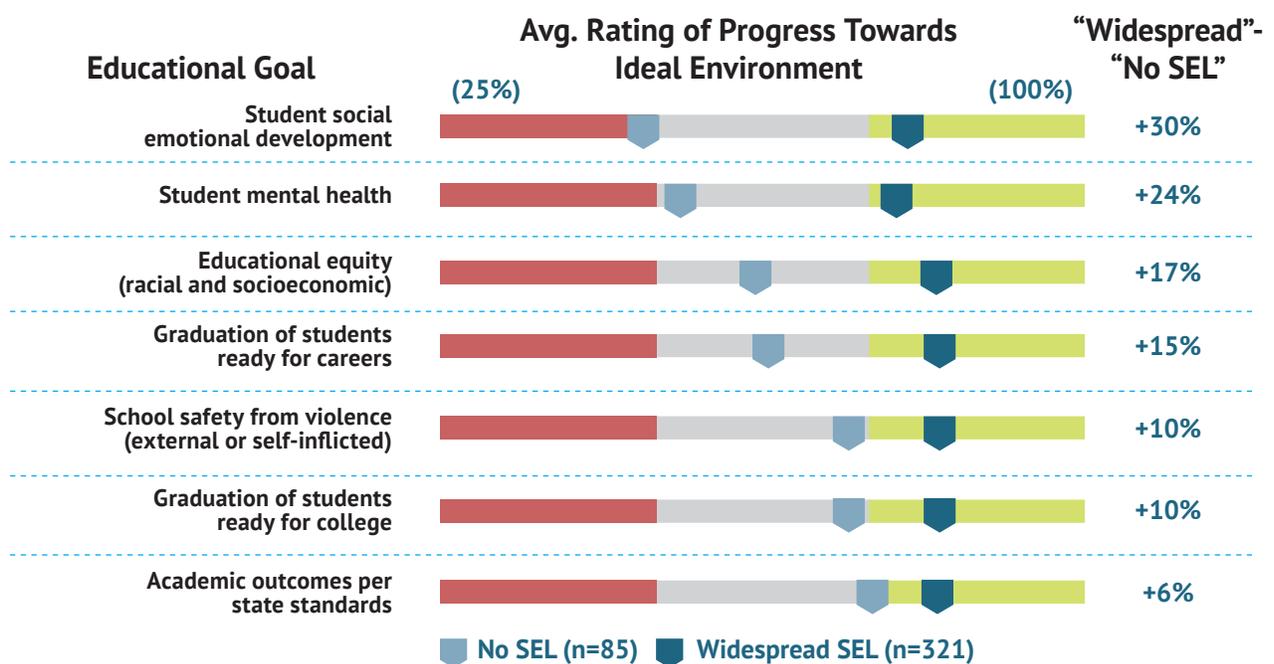
Top 5 Suppliers (% of TA users)

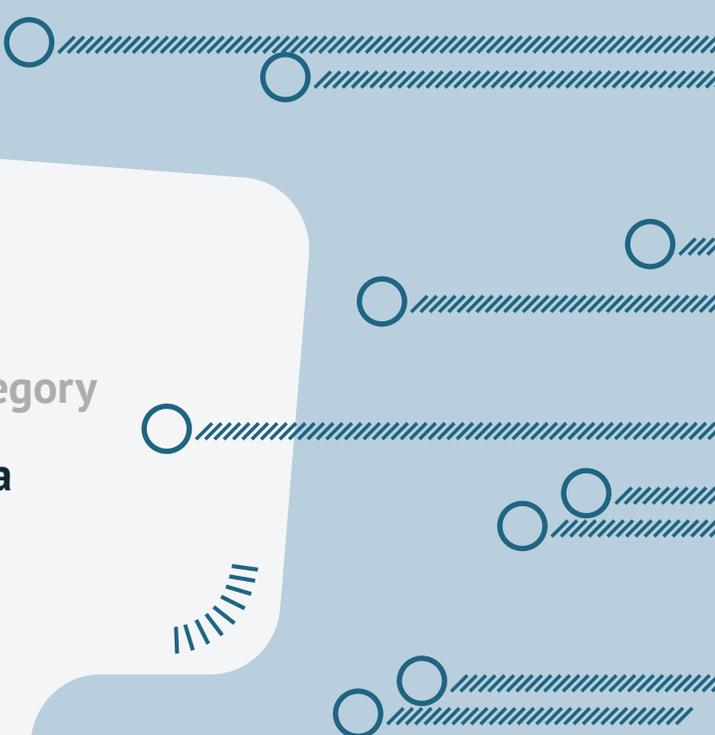


Difference in self-reported progress towards ideal environment between schools (K-5) that implement SEL on widespread basis and those without SEL



Difference in self-reported progress towards ideal environment between schools (6-12) that implement SEL on widespread basis and those without SEL





Appendix

Section 1: Detail by SEL Category

Section 2: Demographic Data
and Analysis

Figure 1.2 : SEL Adoption

	Schools K-5	Schools 6-12	District
FRPL%	45%	44%	43%
Black & Hispanic	29%	32%	25%

Figure 2.1 : % respondents using SEL to address the specified educational goal

(Note that the sample varies for each educational goal)

	FRPL% by Educational Goal			Black & Hispanic % by Educational Goal		
	Schools K-5	Schools 6-12	District	Schools K-5	Schools 6-12	District
	Social Emotional Development	45%	44%	41%	28%	33%
Student mental health	45%	41%	40%	29%	31%	23%
Educational equity	58%	49%	43%	37%	39%	30%
School safety from violence	47%	45%	41%	27%	32%	25%
Academic outcomes	46%	44%	46%	28%	30%	28%
Graduation of students ready for careers	48%	42%	46%	21%	27%	24%
Graduation of students ready for college	59%	40%	39%	38%	32%	22%

Figure 4.1 : Self-reported progress towards an ideal environment for various educational goals (Note that the sample varies for each educational goal)

	Respondents with “Widespread SEL”					
	FRPL% by Educational Goal			Black & Hispanic % by Educational Goal		
	Schools K-5	Schools 6-12	District	Schools K-5	Schools 6-12	District
Soc. emotional dev	46%	44%	44%	28%	32%	27%
Student mental health	46%	44%	44%	28%	33%	28%
Educational equity	47%	45%	44%	28%	33%	28%
School safety from violence	46%	44%	43%	28%	33%	28%
Academic outcomes	46%	44%	44%	28%	33%	27%
Grad. of students ready for careers	45%	43%	44%	27%	33%	27%
Grad. of students ready for college	44%	43%	46%	27%	33%	26%

	Respondents with “No SEL”					
	FRPL% by Educational Goal			Black & Hispanic % by Educational Goal		
	Schools K-5	Schools 6-12	District	Schools K-5	Schools 6-12	District
Soc. emotional dev	55%	52%	40%	43%	31%	22%
Student mental health	55%	51%	37%	43%	33%	25%
Educational equity	58%	52%	41%	42%	34%	24%
School safety from violence	59%	52%	38%	44%	35%	24%
Academic outcomes	52%	51%	42%	42%	33%	30%
Grad. of students ready for careers	60%	53%	40%	35%	33%	25%
Grad. of students ready for college	55%	51%	39%	39%	33%	28%

Respondent roles

SEL program and practice adoption by role

SEL Programs or practices	School Psychologists	Principals / APs	Teachers	Guidance Counselors	Other	Difference between Psychologists & Principals
Curriculum	47%	50%	33%	35%	18%	-3%
Professional Development	47%	53%	16%	43%	21%	-6%
Measurement	18%	20%	43%	18%	8%	-2%
Change management	16%	23%	18%	20%	8%	-7%
Technical assistance	4%	2%	5%	6%	3%	2%

*Note: School total n = 2,505, Psychologists n = 889, Principals n = 173, Teachers n = 857, Guidance counselors n = 286, Other n = 661

Adoption drivers by role: percent of respondents using SEL as an intervention / initiative for each educational goal

Goal	Total school-level	School Psychologists	Principals / APs	Teachers	Guidance Counselors	Other	Difference between Psychologists & Principals
Student social emotional development	82%	82%	85%	82%	82%	75%	-3%
Student mental health	77%	75%	91%	85%	71%	75%	-16%
Educational equity	49%	44%	59%	52%	40%	42%	-15%
School safety from violence	51%	50%	41%	55%	52%	48%	9%
Academic outcomes per state standards	37%	41%	49%	31%	34%	37%	-8%
Graduation of students ready for careers	35%	29%	41%	38%	28%	38%	-12%
Graduation of students ready for college	31%	25%	38%	35%	26%	29%	-13%

*Note: School total n ranges from = 271-1105 per educational goal, Psychologists n ranges from 28-462 per educational goal, Principals n ranges from 17- 89 per educational goal, Teachers n ranges from 122- 306 per educational goal, Guidance counselors n ranges from 15-107 per educational goal, Other n ranges from 26 - 138

Respondent roles

Perception on progress towards ideal relative to goals by role: progress towards ideal rating by role for respondents with widespread SEL

Goal	Total	School Psychologists	Principals / APs	Teachers	Guidance Counselors	Other	Difference between Psychologists & Principals
Student social emotional development	79%	77%	82%	79%	83%	81%	-6%
Student mental health	76%	74%	77%	76%	80%	78%	-4%
Educational equity	77%	71%	81%	81%	79%	81%	-9%
School safety from violence	82%	79%	85%	84%	85%	81%	-6%
Academic outcomes per state standards	80%	79%	81%	80%	85%	78%	-2%
Graduation of students ready for careers	78%	75%	80%	78%	84%	79%	-5%
Graduation of students ready for college	79%	78%	79%	79%	84%	79%	-1%

*Note: School total n = 738-804, Psychologists n = 257-297,, Principals n = 77-82, Teachers n = 229-235, Guidance counselors n = 78-87, Other n = 96-102

SEL implementation perception by role: progress towards ideal SEL implementation

Progress towards ideal	Total school-level	School Psychologists	Principals / APs	Teachers	Guidance Counselors	Other	Difference between Psychologists & Principals
SEL overall	70%	68%	76%	69%	73%	73%	-8%
Curriculum	74%	72%	81%	74%	78%	76%	-9%
Professional development	74%	72%	79%	73%	76%	76%	-7%
Measurement	77%	74%	84%	74%	81%	81%	-10%
Change Management	76%	74%	78%	74%	79%	83%	-4%
Technical Assistance	77%	74%	90%	75%	80%	83%	16%

*Note: School total n = 110-1,581, Psychologists n ranges from 35 - 186, Principals n ranges from 4-43, Teachers n ranges from 38-165, Guidance counselors n ranges from 46-53, Other n ranges from 19-182

District race

SEL program and practice adoption by role

SEL Programs or practices	Total	>50% Black and Hispanic	<50% Black and Hispanic	>50% Black and Hispanic - <50% Black and Hispanic
Curriculum	44%	38%	46%	-8%
Professional Development	49%	48%	51%	-3%
Measurement	19%	16%	20%	-4%
Change management	19%	17%	20%	-3%
Technical assistance	5%	6%	5%	2%

*Note: n >50% Black and Hispanic is 447, n <50% Black and Hispanic is 1,285

Adoption drivers by race: percent of respondents using SEL as an intervention / initiative for each educational goal

Goal	Total school-level	>50% Black and Hispanic	<50% Black and Hispanic	>50% Black and Hispanic - <50% Black and Hispanic
Student social emotional development	82%	78%	84%	-6%
Student mental health	77%	77%	77%	0%
Educational equity	49%	40%	54%	-14%
School safety from violence	51%	49%	50%	-2%
Academic outcomes per state standards	37%	37%	38%	-1%
Graduation of students ready for careers	35%	30%	34%	-4%
Graduation of students ready for college	31%	26%	30%	-4%

*Note: n > 50% Black and Hispanic ranges from 43-195, n < 50% Black and Hispanic ranges from 112 to 622

District race

Perception on progress towards ideal relative to goals by race: difference in progress towards ideal rating by role for respondents with widespread SEL vs. No SEL

Goal	Total	>50% Black and Hispanic	<50% Black and Hispanic	>50% Black and Hispanic - <50% Black and Hispanic
Student social emotional development	31%	42%	30%	12%
Student mental health	24%	37%	23%	15%
Educational equity	15%	21%	13%	7%
School safety from violence	11%	23%	8%	15%
Academic outcomes per state standards	10%	17%	11%	6%
Graduation of students ready for careers	14%	19%	13%	6%
Graduation of students ready for college	9%	10%	13%	-3%

*Note: n > 50% Black and Hispanic widespread SEL range from 105-132, n >50% Black and Hispanic no SEL range from 21-29; n for <50% Black and Hispanic widespread SEL range from 420-467 and n <50% Black and Hispanic no SEL range from 48-58

SEL implementation perception by race: progress towards ideal SEL implementation

Progress towards ideal	Total school-level	>50% Black and Hispanic	<50% Black and Hispanic	>50% Black and Hispanic - <50% Black and Hispanic
SEL overall	70%	69%	71%	-2%
Curriculum	74%	75%	74%	1%
Professional development	74%	73%	75%	-2%
Measurement	77%	78%	76%	2%
Change Management	76%	78%	77%	1%
Technical Assistance	77%	84%	75%	9%

*Note: n >50% Black and Hispanic ranges from 24-185, n <50% Black and Hispanic ranges from 52-588

Poverty level (FRPL)

SEL program and practice adoption by poverty level

SEL Programs or practices	Total	>75% FRPL	<25% FRPL	>75% FRPL - <25% FRPL
Curriculum	44%	35%	36%	-1%
Professional Development	49%	39%	38%	1%
Measurement	19%	14%	15%	-1%
Change management	19%	15%	13%	2%
Technical assistance	5%	5%	2%	3%

*Note: >75% FRPL n = 479, <25% FRPL n=767

Adoption drivers by poverty level: percent of respondents using SEL as an intervention / initiative for each educational goal*

Goal	Total school-level**	>75% FRPL	<25% FRPL	>75% FRPL - <25% FRPL
Student social emotional development	82%	80%	83%	-3%
Student mental health	77%	75%	75%	0%
Educational equity	49%	48%	42%	6%
School safety from violence	51%	49%	55%	-6%
Academic outcomes per state standards	37%	31%	40%	-9%
Graduation of students ready for careers	35%	33%	30%	3%
Graduation of students ready for college	31%	32%	31%	1%

*Note: >75% FRPL n ranges from 30-172, <25% FRPL n ranges from 53-294

**Note: this data includes respondents with poverty levels from 25% FRPL to 75% FRPL (that are not captured in this data)

Poverty level (FRPL)

Perception on progress towards ideal relative to goals by poverty level: difference in progress towards ideal rating by role for respondents with widespread SEL vs. No SEL

Goal	Total	>75% FRPL	<25% FRPL	>75% FRPL - <25% FRPL
Student social emotional development	31%	37%	25%	12%
Student mental health	24%	33%	25%	8%
Educational equity	15%	18%	2%	16%
School safety from violence	11%	16%	9%	7%
Academic outcomes per state standards	10%	18%	7%	11%
Graduation of students ready for careers	14%	14%	5%	9%
Graduation of students ready for college	9%	9%	4%	5%

*Note: >75% FRPL Widespread SEL n = 132, No SEL n = 25, <25% widespread SEL n = 202, No SEL = 19

SEL implementation perception by poverty level: progress towards ideal SEL implementation

Progress towards ideal	Total school-level	>75% FRPL	<25% FRPL	>75% FRPL - <25% FRPL
SEL overall	70%	70%	71%	-1%
Curriculum	74%	74%	74%	0%
Professional development	74%	77%	76%	1%
Measurement	77%	77%	75%	2%
Change Management	76%	81%	77%	4%
Technical Assistance	77%	74%	67%	7%

*Note: >75% FRPL n ranges from 21-242, <25% FRPL n ranges from 25-400