

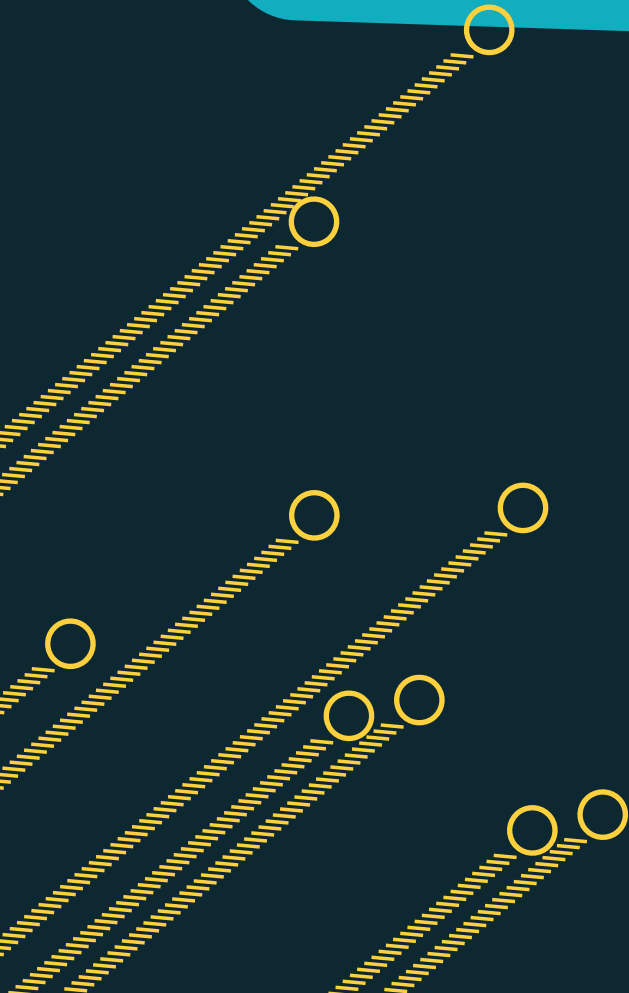
Finding Your Place 2021:



Social Emotional Learning Takes Center Stage in K-12



October 2021



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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.



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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 spans the entire education ecosystem from early childhood through corporate and workforce learning for a diverse array of companies, non-profit organizations, foundations, institutions, and investors.

For more information, visit tytonpartners.com.

Authors:

- » Gates Bryant, Partner
- » Andrea Mainelli, Senior Advisor
- » Sean Crowley, Senior Principal
- » Cait Glennen, Senior Associate
- » Kojo Edzie, Analyst

Contributors:

- » Anh Nguyen, Data Scientist
- » Caroline Davidsen, Senior Associate

If you have any questions on the report or would like to discuss further any topics related to social emotional learning, please contact [Andrea Mainelli \(amainelli@tytonpartners.com\)](mailto:amainelli@tytonpartners.com) or [Sean Crowley \(scrowley@tytonpartners.com\)](mailto:scrowley@tytonpartners.com).



Foreword

Long before the COVID-19 pandemic put a spotlight on social and emotional learning (SEL), educators, researchers, and child advocates were coalescing around how to more fully support students' learning and development. The Collaborative for Academic, Social, and Emotional Learning (CASEL) first introduced the term "SEL" in the mid-1990s, launching a field dedicated to nurturing all children's social, emotional, and academic growth.

In the years since, hundreds of research studies have been conducted on SEL, including four major meta-analyses. These studies suggest that SEL programs can contribute to [long-term academic growth](#), and may be just as effective as programs designed specifically to support academic learning. A large research base can now confirm what many educators have seen firsthand—that SEL is not a tradeoff for rigorous academic instruction; it's a catalyst for teaching and learning. Additionally, research shows SEL can improve students' social and emotional skills, reduce problem behaviors, lower emotional distress such as depression and anxiety, and improve how students perceive their school, themselves, and others.

Not surprisingly, the demand for SEL has skyrocketed—in the past few years, [principals](#), [teachers](#), [researchers](#), [parents](#), [employers](#), and [students themselves](#) have introduced SEL learning standards or guidelines, and districts across the country have been integrating SEL across their classrooms, schools, and family and community partnerships.

More recently, the COVID-19 pandemic and the attention to racial injustices have underscored that supportive relationships and learning environments matter, and that social and emotional skills are as important to student success as academic skills. While educators have long known this to be true, the challenges of the past years have raised students' well-being and social and emotional development to the top of their priority list. We now see more clearly than ever the need for school systems that foster a sense of community, build upon students' strengths, and cultivate school-family-community partnerships that support young people's development. We also see that not only is it possible to teach skills like empathy, resilience, and critical thinking, but that these competencies are essential for the world that young people will enter.

As attention to SEL has grown, so too has confusion over what SEL means and how to best implement it within the day-to-day realities of classrooms and schools. CASEL defines SEL as the process through which all young people and adults acquire and apply

the knowledge, skills, and attitudes to develop healthy identities; manage emotions and achieve personal and collective goals; feel and show empathy for others; establish and maintain supportive relationships; and make responsible and caring decisions.

In schools, SEL can take many different forms, but it often involves a focus on building positive relationships among students and adults, dedicated time to learn social and emotional skills, and weaving in opportunities for students to practice reflection and collaboration during academic subjects.

SEL is best implemented through school-family-community partnerships that develop shared priorities and coordinate policies and practices across different places where students live and learn. These local decisions drive planning, implementation, and assessments of SEL.

As a growing number of SEL programs and practices are introduced into schools, one of the biggest priorities for the SEL field is ensuring high-quality implementation, backed by science and sound policies. Selecting [evidence-based SEL programs](#) that align with local standards and priorities helps guide strategic implementation and ensure SEL instruction that is developmentally appropriate and culturally responsive. Effective SEL implementation also requires a rigorous commitment to ongoing continuous improvement.

As demand for SEL continues to rise, this report contributes to our understanding of how schools and districts are navigating SEL programs, frameworks, and resources to address pressing priorities and align with quality standards and practices. The question is no longer whether SEL is important—it is how we will best implement SEL as an essential part of PreK-12th grade education that supports equity and excellence for all students.



Melissa Schlinger

Vice President of Programs and Practice

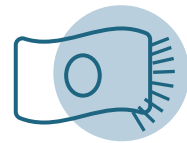
Collaborative for Academic, Social, and Emotional Learning (CASEL)

Executive Summary

In the spring of 2021, Tyton Partners conducted primary research to follow up on the 2020 report ([Finding Your Place: The Current State of SEL in K-12](#)) to assess the continued development of the field of social emotional learning, to understand the effects that COVID-19 and rising awareness of racial injustice have had on SEL in the classroom, and to gain a more holistic view of SEL ecosystem health from both the supply- and demand-sides. As such, this report is informed by a “supply-side” survey of over 100 SEL providers and a “demand-side” survey of over 2,000 school and district administrators and teachers. In the report that follows, we will share our findings, answering the above questions, among others, and seeking to draw out implications for the field as a whole. We expect it to be useful to practitioners, funders, investors, and providers alike as it illuminates key dynamics at play in the ecosystem, where the field is at in the wake of COVID-19, and what actions can be taken to improve the quality of implementation and offerings.

The report is organized around four key findings from the research about K-12 SEL during the school day:

1. SEL adoption and spending has grown rapidly over the past 1.5 years



- » SEL school and district spend grew approximately 45% from \$530M to \$765M between November 2019 and April 2021
- » SEL adoption has increased most notably in Curriculum, Measurement, and Programmatic Implementation in grades 6-12, and Programmatic Implementation in grades K-5
- » SEL adoption is highest among the Professional Development and Curriculum categories across districts and schools at all grade levels

2. During the past school year, student well-being has become the top priority across schools and districts



- » Student mental health and well-being, student social emotional development, and school diversity, equity, and inclusion have risen to become the top strategic priorities among school and district survey respondents, representing a dramatic shift since the onset of COVID-19

- » A majority of schools and districts believe that COVID-19 and the increased focus on racial injustices have accelerated interest in SEL at their school / district
- » Closing achievement gaps for racially marginalized students is one of the top three goals among those who are using SEL to improve diversity, equity, and inclusion in their school or district

3. The SEL field is still working to coalesce around a definition of quality and requires viable pathways to increase quality adoption



- » There are myriad SEL frameworks in use across the field today seeking to define quality standards and/or best practices, the most popular of which are CASEL's Core SEL Competencies, the Emotional Intelligence model, and 21st Century Skills
- » Awareness and adoption of SEL quality standards/frameworks remain low today, especially in relation to awareness and adoption of SEL in general
- » Analysis of data in schools and districts indicates that SEL aligned with a more comprehensive Programmatic Implementation in the taxonomy is correlated with higher measures across key dimensions of quality in practice (e.g., perceived progress towards the ideal, length of SEL implementation)

4. The SEL ecosystem is characterized by a moderately-healthy supply side and a still-emerging demand side, with distinct challenges threatening long-term sustainability



- » Despite the rapid growth of the past year, the adoption of more formal programs and practices is still emerging; schools and districts will require continued encouragement and guidance to continue scaling and deepening the adoption
- » Threats to long-term sustainability include heavy reliance on grant funding over program service fees and district reliance on federal funding to support recent SEL spending growth

Calls to Action

School and District Leaders



- » To address issues of student social emotional development and student mental health and well-being, it is crucial to build local alignment around goals, focus on adopting programs and practices that align with high-quality standards or frameworks, and be intentional about implementing them with quality
- » There is strong momentum today around SEL and federal stimulus dollars are providing ample revenue streams to spend on new and/or improved SEL programming, but the opportunity must be used to create a strong foundation for the future of SEL at your school or district

SEL Funders

- » SEL is experiencing rapid growth and momentum, but there is still relatively low awareness and adoption when it comes to high-quality, evidence-based SEL; funders should collaborate to help the field coalesce around clear definitions of quality and pathways to adoption
- » SEL ecosystem health is a function of both the supply side and the demand side; funders should explore opportunities to further development across both sides of the ecosystem
- » The long-term sustainability of SEL is far from guaranteed: providers need help in developing sustainable revenue models that will serve them over the long term, and schools and districts need plans to maintain SEL funding when federal stimulus dollars run out. Funders can support in the pursuit of both

SEL Providers

- » Explore expansion of offerings across categories and approaches to better meet school and district needs, and to benefit from the integration that may be found through different combinations across the taxonomy
- » Consider adding or improving implementation support and technical assistance to ensure schools and districts can effectively implement offering(s) in a manner that is responsive to local priorities
- » Seek to align with high-quality standards/frameworks and develop an evidence base to demonstrate differentiation as a high-quality offering
- » Take advantage of the strong momentum to prepare for the future by developing more sustainable revenue streams that are less reliant on philanthropic funding

I. The Rapid Rise of SEL



Key findings:

▶ There are three broad approaches to SEL: SEL skill development, embedded learning, and schoolwide programs and practices

▶ SEL offerings span five categories: curriculum, professional development, measurement, programmatic implementation, and technical assistance

▶ SEL school and district spend grew ~45%, from \$530M to \$765M, between November 2019 and April 2021



Tyton Partners estimates that SEL school and district spend has grown ~45% from \$530M to \$765M between November 2019 and April 2021. This rapid growth is driven by a combination of adoption and spending growth across a wide taxonomy of SEL categories and approaches. In this section, we will first revisit what that SEL taxonomy consists of, then explore what adoption looks like today relative to the taxonomy, how that has changed over the past year and a half, and tie it back to this increase in market size.



SEL Adoption Spans a Wide Variety of Categories And Approaches in Practice

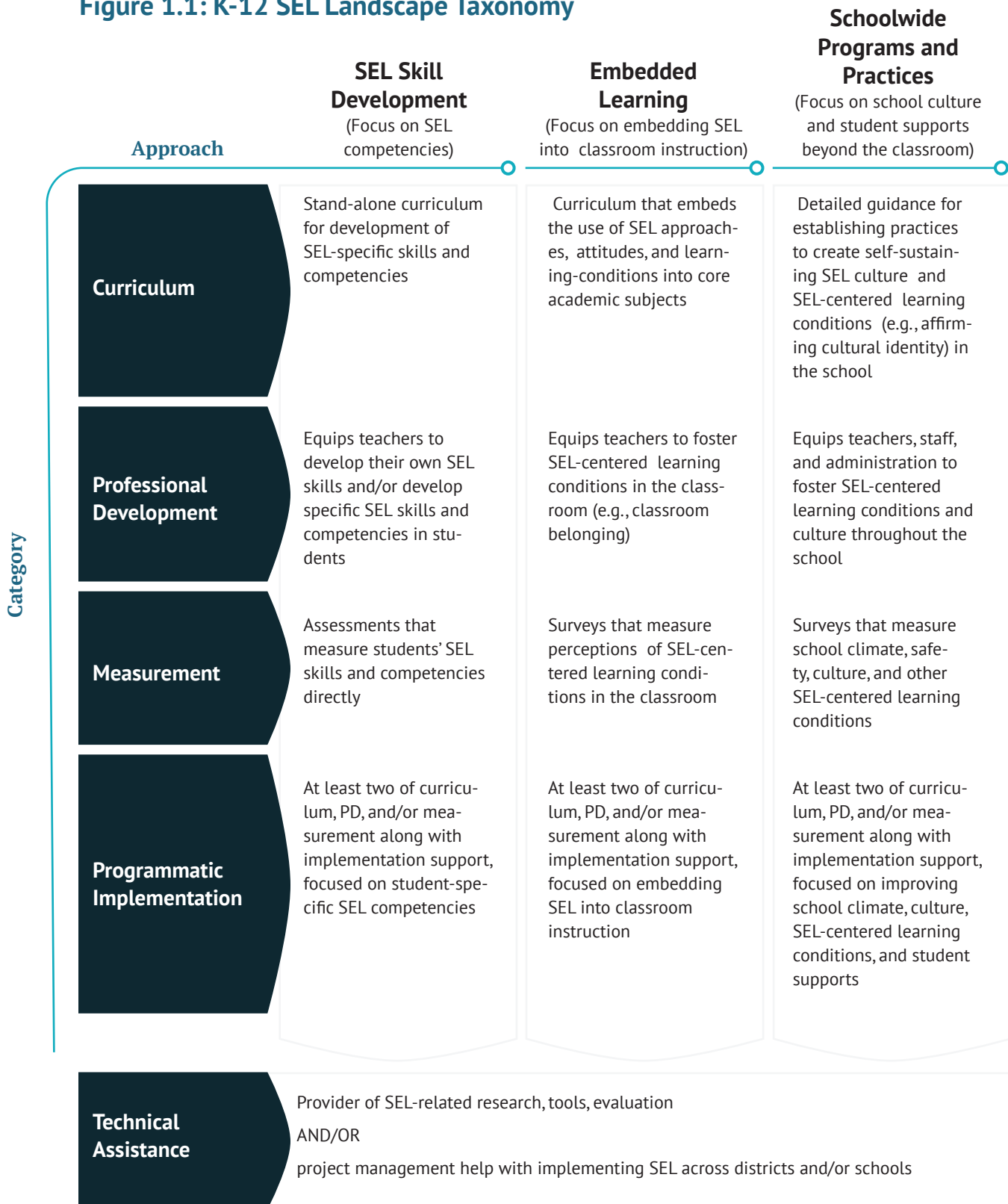
Our 2020 report described the variety of available SEL offerings through a taxonomy encompassing five SEL categories and three SEL approaches. This taxonomy remains a helpful tool, although we have made some important refinements, as seen below in Figure 1.1.

The most significant change is the elimination of last year’s “Change Management” category for a new category entitled “Programmatic Implementation.” Following feedback from the field on the taxonomy, we held numerous discussions with experts, providers, and practitioners who suggested the modification of this category. Programmatic Implementation seeks to represent those SEL programs that include a combination of at least two—though sometimes all—of SEL curriculum, professional development, and or measurement offerings along with implementation support. For example, while many programs offer a combination of curriculum and professional development, it is the presence of substantive implementation supports that puts an offering into the “Programmatic Implementation” category. As such, these offerings are typically more costly, higher touch, and more time intensive to adopt. But, as we will see later in this report, these offerings may be more effective for those willing to commit.

How to read the SEL taxonomy

SEL categories (e.g., curriculum, professional development) are aligned with traditional education segments. SEL approaches (e.g., SEL skill development, embedded learning) denote distinct methodologies for incorporating SEL into school settings. For example, with curriculum focused on SEL skill development, 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 schoolwide 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 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 Landscape Taxonomy



Sources: CASEL, individual supplier websites, secondary market research, Tyton Partners interviews and analysis

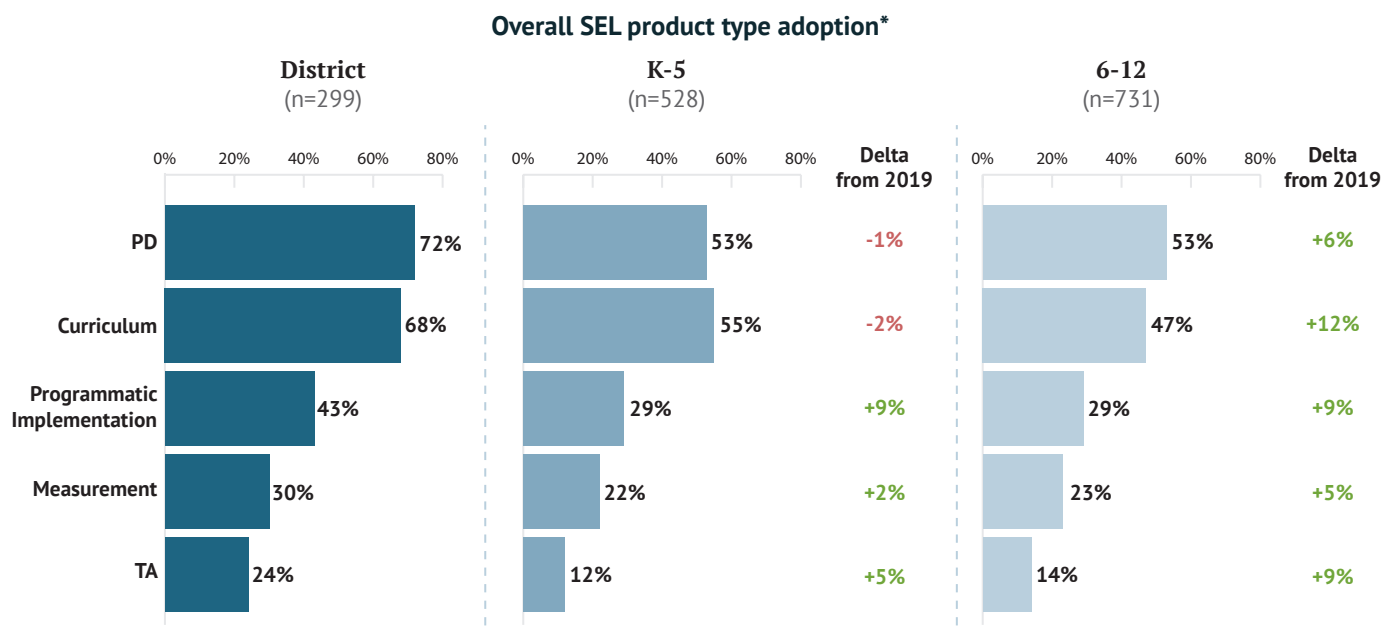
SEL Adoption Increased Across All Categories in 2021

As can be seen in figure 1.2 below, by category, adoption of SEL Professional Development (PD) and SEL Curriculum lead the way across districts, K-5 schools, and 6-12 schools. Adoption of Programmatic Implementation (PI) trails by ~20-25%, with SEL Measurement, and SEL Technical Assistance (TA) the least adopted categories at every level. Since our previous survey was fielded in November 2019, adoption has grown across almost every category. We do see a slight drop in PD and Curriculum adoption at the K-5 level. However, this drop is likely related to the change in the taxonomy of “Change Management” to “Programmatic Implementation,” which now includes adoption across both PD and Curriculum. So, some of those respondents who indicated both Curriculum and PD usage last year likely chose Programmatic Implementation instead this year, accounting for the drop. This assumption is supported by spending data and field interviews as well.

The most notable increase was the SEL adoption growth throughout the middle and high school years (i.e., grades 6-12), across all categories including a ~12% increase in SEL curriculum adoption. This increase represents a great effort by schools and districts to expand SEL programming to these grade levels, and the providers rushing to meet these needs.

Figure 1.2: SEL Adoption and Delta vs. Nov 2019

Note that District deltas from 2019 are excluded due to a change in sampling at the district level, which resulted in adoption rates more in line those reported by schools this year vs. last year



*Notes: *In 2019 survey, we did not ask about programmatic implementation and instead asked about change management so it's not a direct comparison*

Source: Tyton Partners SEL School and District Survey 2021; Tyton Partners analysis

We also analyzed survey results for two separate demographic groups:

1. Respondents from high-poverty districts (>75% free and reduced-price lunch student population)
2. Respondents from majority Black and Latinx districts (>50% Black and/or Latinx student populations)

(Note: groups are not mutually exclusive and include overlap in respondents whose districts fit both profiles)

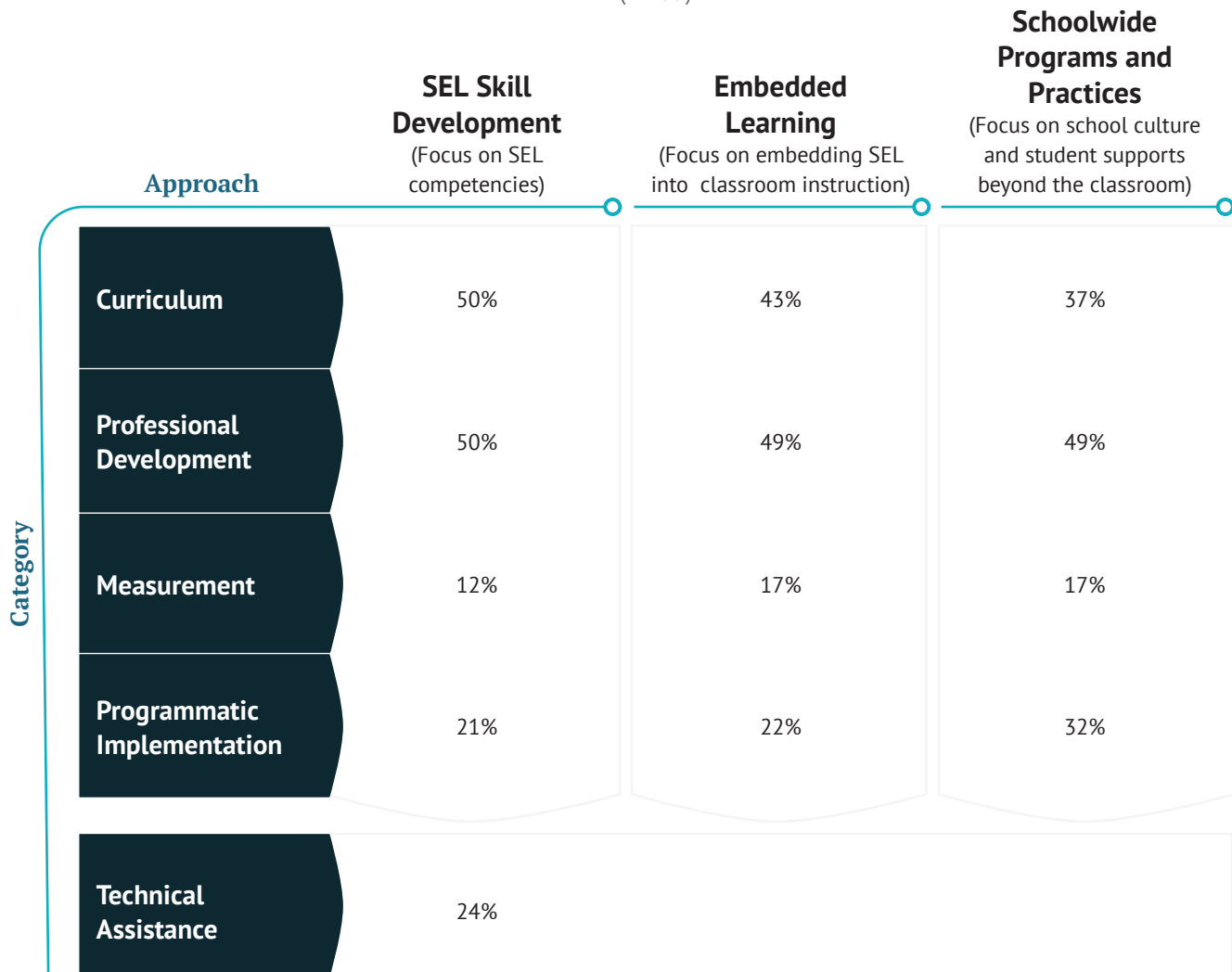
For each group, we looked at SEL adoption across categories and by level (district, K-5 schools, 6-12 schools). For both groups, the variance in adoption relative to the general population was + / - 3-4% for most types of SEL (within the survey's margin of error), meaning these groups adopted SEL about as often as the general populations. The one exception is within the category of SEL PD, where adoption by majority Black and Latinx districts is 5% less than that of the general population, and adoption by high-poverty districts is 8% less than the general population.

To obtain a deeper understanding of SEL adoption by category and approach, we asked school and district survey respondents to indicate all types of SEL programs and practices in use at their school or district (See Figure 1.3 below; note that this was a “select all that apply” survey question, as multiple types of SEL can be used concurrently).

As expected, SEL skill development programs were indicated as the most commonly used form of SEL, with 50% of district respondents indicating usage of SEL skill-development focused curriculum and professional development (PD). Among those using programmatic implementation, schoolwide programs and practices were favored, seeing 32% usage in districts compared with 21% and 22% for skill-development and embedded-learning approaches, respectively. Measurement saw the least adoption across categories, within which schoolwide and embedded approaches were favored to skill development.

Figure 1.3: SEL Adoption Across the Taxonomy at the District Level

(n=299)

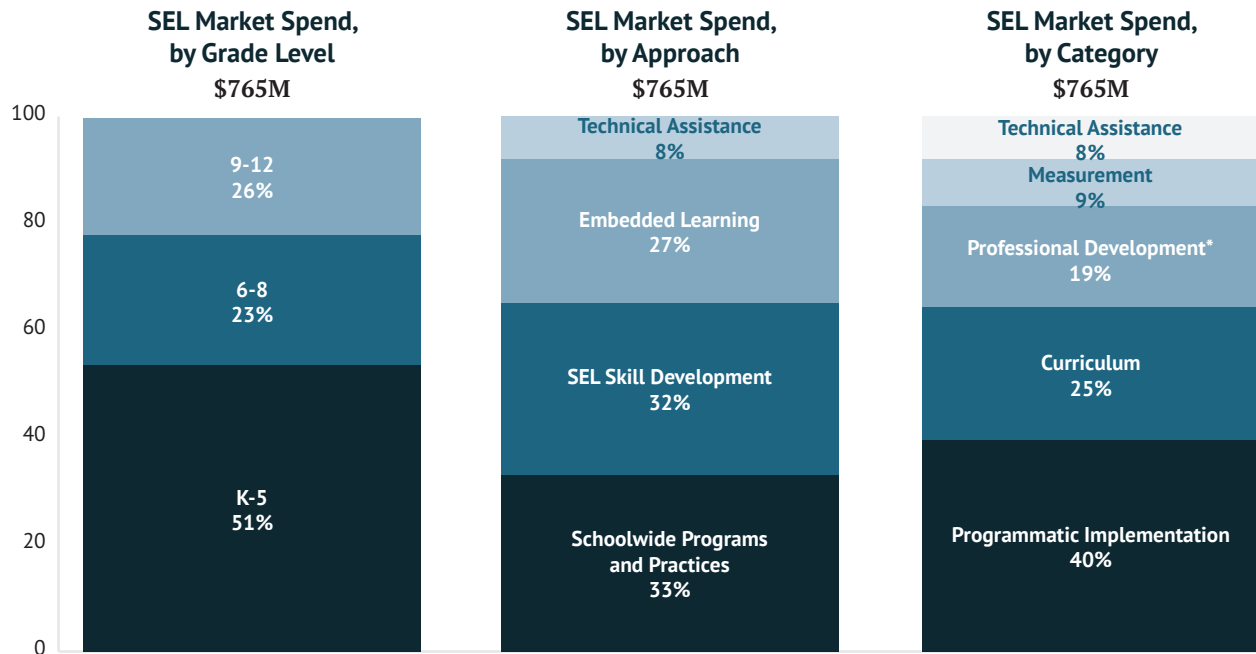


Notes: *Question asked respondents to, "Please indicate in the grid below all of the types of SEL programs and practices, if any, in use in your district."

Source: Tyton Partners SEL School and District Survey 2021; Tyton Partners analysis

As of April 2021, when our survey was fielded, K-12 SEL adoption comprises an ~\$765M market by school and district spending. About half of this spending can be attributed to K-5. Spending is roughly even across approaches with schoolwide programs and practices (33%) and SEL Skill Development (32%) slightly ahead of Embedded Learning (27%). By category, Programmatic Implementation accounts for roughly 40% of spend, with its high price tag (avg. \$15,000 / school) offsetting its relatively lower adoption (29% in schools, 43% in districts). Curriculum and PD make up 25% and 19% of category spend, followed by Measurement (9%) and Technical Assistance (8%). The graph below displays this market size breakdown by grade, approach, and category, along with key drivers of change when compared to November 2019.

Figure 1.4: K-12 SEL Market Size and Growth Attribution, School and District Spend, as of April 2021



*Includes Professional Development spend for teachers only. Inclusion of admin. and staff would increase SEL PD estimate by ~50%.

Sources: Tyton Partners SEL School and District Survey 2021; Tyton Partners analysis.

Change and Key Drivers vs. November 2019

- » TA spend was relatively flat since 2019
- » Measurement increased \$36M (115%) due to increased adoption of 2-5% across grades and \$4 increase in avg. spend per student (to \$9)
- » PD increased \$90M (180%) driven by increased adoption of 6%+ at the 6-12 levels, and a meaningful jump in average spend from \$50 to \$125 per educator
- » Curriculum increased \$80M (80%) driven by increased adoption of 12% at the 6-12 levels and a \$4.20 increase in avg. spend per student (to \$11)
- » Programmatic Implementation increased \$26M (9%) from the prior estimate on “Change Management”, driven by meaningful adoption increases of 9%+ across all grade levels and more of that usage being “widespread,” which was offset by a drop in average spend per school from \$22,000 to \$15,000

In the next section, we will explore additional ecosystem dynamics that contribute to this growth in spending and adoption. But before that, we explore an interesting perspective on the rise of SEL through the lens of comparing “markets” and “movements.”

SEL displays characteristics of a movement and a market:

It is undeniable that SEL is receiving increased attention from both supporters and detractors. In this year’s school and district survey, we once again saw that there is near-unanimous awareness of SEL, and over 90% of districts reported implementing some kind of SEL. With high awareness and dramatic increases in spending, should we consider this movement building or market building? We believe the data proves out that SEL displays characteristics of both, a combination that has, in part, led to explosive growth over the past year and a half.



* Walker, B. & Soule, S.A. (2017). *Changing Company Culture Requires a Movement, Not a Mandate*. Harvard Business Review. <https://hbr.org/2017/06/changing-company-culture-requires-a-movement-not-a-mandate>

SEL is in a unique stage in its development because it displays clear characteristics of movements and markets, but what are the implications? The two biggest are growth and staying power. There are plenty of movements that influence thinking and behavior, but don't translate to a change in consumer spending habits, instructional practices, or student outcomes much less generate the rise of a new marketplace. And conversely, plenty of markets form to match supply and demand, but many lack the passion and influence that come from movements.

SEL has become a robust marketplace with meaningful spending occurring across a large and growing variety of providers. And plenty of teachers and school and district administrators see its value to improve student well-being and outcomes in the classroom, whether it is categorized as a movement or not. But the movement is also fueled by passionate supporters who serve as champions for SEL within schools and districts and view SEL as a means to evolve education for the better, in service of the whole child.



Key Implications:

▶ SEL is a fast-growing market, gaining significant traction with schools and districts

▶ While Curriculum and Professional Development are the most used categories today, there is significant room for growth among Programmatic Implementation and Measurement categories

▶ As schools and districts expand their grade 6-12 implementation, and providers follow suit with their offerings, it will be important for the field to evolve best practices to best meet the needs of older students



II. Student Well-Being Takes Center Stage



Key findings:

A majority of schools and districts believe that both COVID-19 and the increased focus on racial injustice have accelerated interest in SEL at their school/district

Closing achievement gaps for racially marginalized students is one of the top three goals among those who are using SEL to improve diversity, equity, and inclusion in their school or district

Student mental health and well-being, student social emotional development, and school diversity, equity, and inclusion (DEI) have risen to become the top priorities among school and district survey respondents, representing a dramatic shift since before COVID-19



Survey Reveals Major Shift in School and District Strategic Priorities Since Pre-COVID

The significant growth in the market is driven in part by district respondents indicating that “improving students’ mental health and well-being” and “promoting students’ social and emotional competence” are top priorities, moving from No. 5 and No. 6 on the list of strategic priorities before COVID-19, to No. 1 and No. 2 today. In fact, district respondents naming these priorities increased by 43% and 23%, respectively. And “improving school diversity, equity, and/or inclusion” jumped from No. 8 pre-COVID to No. 3 today, rising 10%.

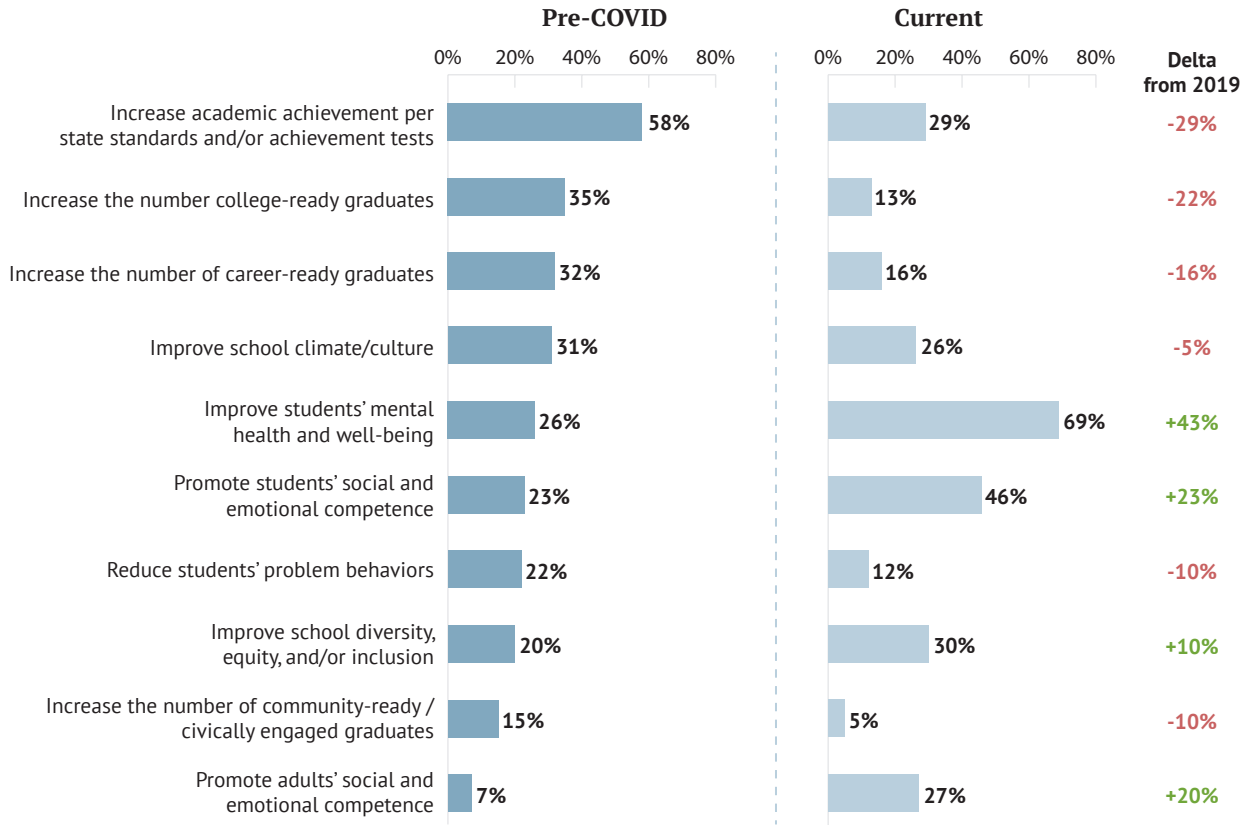
The shift was calculated by asking respondents in our school and district survey to identify the top three strategic priorities, from a list of 10, at their school or district during two different time frames: “Pre-COVID” and the “Current Academic Year (2020-2021).” The data revealed a significant shift in priorities among schools and districts since the onset of COVID-19.

The shifts were even greater at majority Black and Latinx schools, with 50% more respondents indicating student mental health and well-being as a greater priority today than before COVID, 21% more indicating DEI as a priority, and 20% more indicating that both students' and adults' social-emotional competence as priorities. The results show that at majority Black and Latinx schools, mental health and well-being is the No. 1 strategic priority today, DEI is No. 2, and students' social-emotional competence and adults' social-emotional competence are tied in importance at No. 3. Among high-poverty districts, student mental health and well-being is also the No. 1 strategic priority today (+49% since pre COVID), students' social-emotional competencies No. 2 (+24%), adults' social-emotional competence is No. 3 (+28%), and DEI is a close No. 4 (+17%). (Graphs with full data on the demographic breakouts can be found in the appendix).

Figure 2.1: School and District Strategic Priorities Pre-COVID vs. Today

Among the issues highlighted below, what are the most important strategic priorities for your district across the following time periods? Please select up to three per time period.

(n=234)



Source: Tyton Partners K-12 School and District SEL Survey 2021; Tyton Partners analysis

To determine what is driving the growth in SEL program adoption, we also asked respondents which of those strategic priorities they were looking to address through the use of social emotional learning programs, before and after the pandemic. “Improving students’ mental health and well-being” and “promoting students’ social and emotional competence” were indicated as the top two adoption drivers prior to COVID-19, but the number of district respondents identifying each as drivers post-COVID-19 increased by 6 percentage points and 4 percentage points, respectively.

Key takeaways:

1. Schools and districts shifted overall strategic priorities toward student mental health and well-being and student social emotional development
2. Student mental health and well-being and student social emotional development were already the top two priorities that schools and districts were looking to address with SEL, or to state it differently, they were the top two SEL “adoption drivers”
3. During COVID, student mental health and well-being and student social emotional development not only remained the top two SEL adoption drivers, but they became even stronger drivers of SEL adoption than pre-pandemic
4. During this same period following the onset of the pandemic, we saw a significant increase in SEL adoption and spending

To summarize, between November 2019 and April 2021, school and district survey data showed a large shift in schools’ and districts’ strategic focus towards two priorities that are considered the top two drivers of SEL adoption. And during this time, we also saw a meaningful increase in SEL adoption and spending as the entire market grew by upwards of 45%.

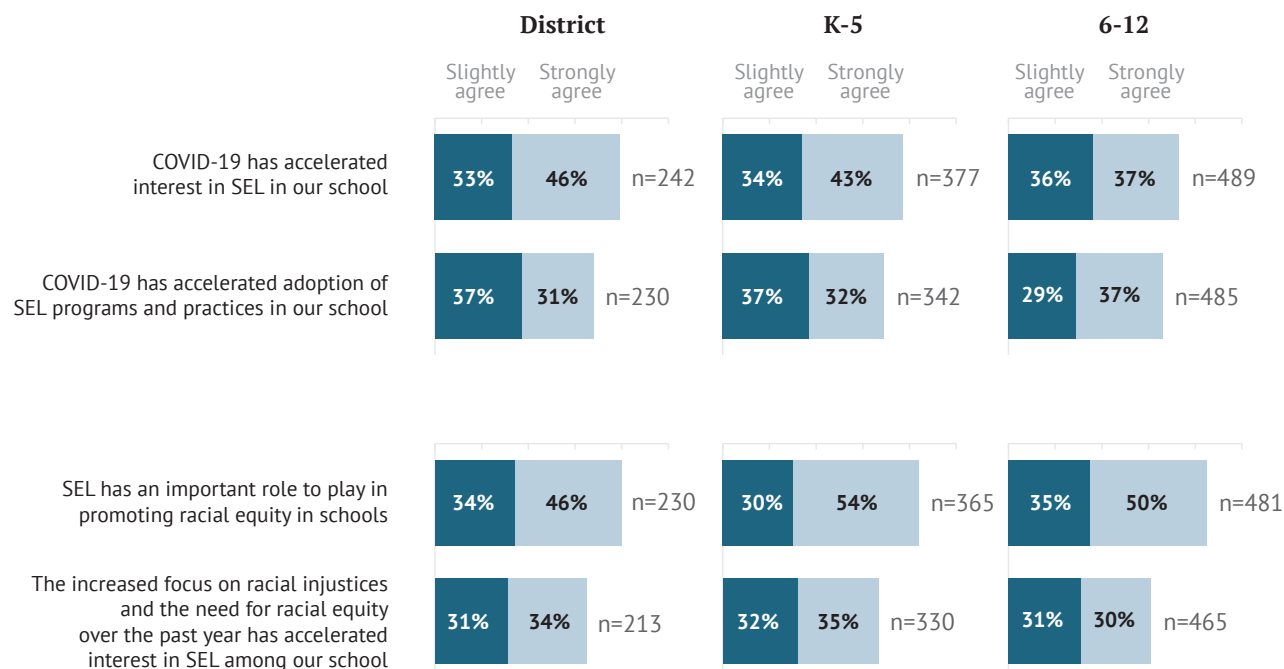
COVID-19 and Increased Focus on Racial Injustices Perceived to be SEL Accelerants

When asked directly about their perception of the effect of COVID-19 on SEL, 70%-80% of school- and district-based respondents indicated that they believe COVID-19 has accelerated interest in SEL at their school or district. And another 60%-70% believe that COVID-19 has also accelerated the adoption of SEL. These perceptions of its impact were even more pronounced among respondents from high Free and Reduced-Price Lunch districts and majority Black and Latinx districts.

Similarly, 60%-70% of respondents across schools and districts perceive that the increased focus on racial injustice and the need for racial equity over the past year has accelerated interest in SEL at their school or district.

Figure 2.2: Perceived Effects of COVID-19 and Racial Injustice

For each of the following statements, please indicate the percent to which you agree or disagree.



These perceptions are supported by additional survey data on behavior, where 43% of district respondents, 39% of K-5 school respondents, and 29% of 6-12 school respondents, indicated that they increased SEL programming as a direct result of COVID-19 and/or racial injustices.

As mentioned at the beginning of this section, improving DEI jumped to No. 3 on the list of school and district strategic priorities during the 2020-2021 academic year. Approximately 10% of respondents also indicated that they were seeking to use SEL to address DEI priorities more specifically. When asked what aspects of DEI they were looking to address through the adoption of SEL, there was meaningful differentiation across districts and schools. Districts pointed to “closing achievement gaps for marginalized students” as the top goal (34%), followed by “improving inclusion of special education students” (30%) and “closing achievement gaps for

students affected by poverty” (30%). K-5 schools pointed to “increasing access to culturally responsive materials” (36%) and “reducing bullying behaviors” (35%) as the top two goals, with “closing achievement gaps for racially marginalized students” (24%) as third. Finally, schools serving grade 6-12 students identified almost equally “closing achievement gaps for racially marginalized students” (31%), “improving the inclusion of racially marginalized students” (30%), and “increasing access to culturally responsive materials” (30%) as the top three.



Key Implications:

▶ Student mental health and well-being and improvement of DEI represent entry points to increase and improve SEL programming at those schools and districts

▶ As SEL is increasingly used to address student mental health and well-being, it will likely become more important to distinguish between those aspects of programming truly focused on social emotional development and those focused on student well-being so as not to dilute positive outcomes

▶ As schools and districts continue to look to use SEL programming to improve DEI, it will be important for leaders in the field and providers both to develop clear roadmaps for how SEL can best be used to address DEI goals



III. A Need for Quality



Key findings:

▶ Today there are myriad SEL frameworks in use across the field seeking to define quality standards and / or best practices, the most popular of which are CASEL's Core SEL Competencies, the Emotional Intelligence model, and 21st Century Skills

▶ Awareness and adoption of SEL quality standards/frameworks remains low, especially in comparison to awareness and adoption of SEL in general

▶ Analysis of data in schools and districts indicates that SEL aligned with Programmatic Implementation in the taxonomy is correlated with higher measures across key dimensions of quality in practice (e.g., perceived progress towards the ideal, length of SEL implementation)



In the last section, we observe a shift by schools and districts towards strategic priorities around student mental health and well-being and student social emotional development. Given the events of the past year, schools and districts are more focused than ever on “solving” these issues. All the growth in adoption is a positive development for the SEL ecosystem overall. However, in the push to rapidly address these important issues, it is tempting for schools and districts to unintentionally implement half-measures, or low-quality measures, that are masquerading as high-quality ones (whether intentionally or unintentionally).

In this section, we will explore two key aspects of quality: first, we discuss quality standards and frameworks, and their importance in setting clear guidelines for the field. Second, we discuss what we can learn about common types of SEL implementation from across our taxonomy, and how they correlate with different practical measures of quality implementation.



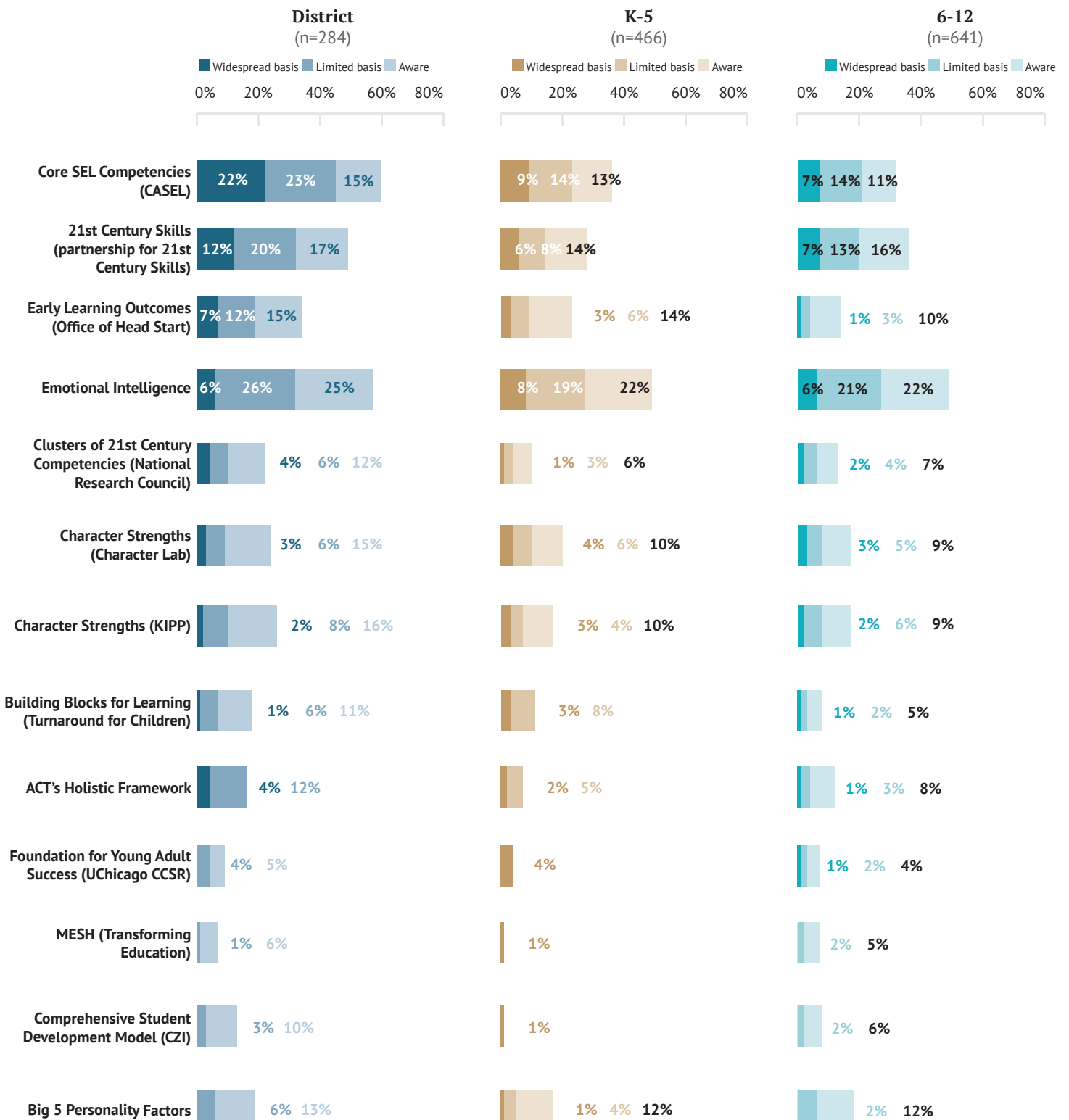
Coalescing Around Quality Standards

Issues around quality are common with a fast-growing market like SEL and represent one of the drawbacks of such rapid growth. High-quality supply may struggle to keep up with growing demand, and the gap is filled by lower-quality options. Or, high-quality supply may keep up, but the growth incentivizes lower-quality supply to enter the market, and users lack the means to effectively discern between what is and is not high quality. In both cases, lower-quality providers may not realize where they are falling short and/or may be lacking a clear path towards improvement. In a complex and nuanced field, such as social emotional learning, it can become difficult to effectively identify (or build towards) quality, especially for those who are new to the field. For this reason and others, it is important to have an agreed-upon blueprint or definition as to how to define what separates high quality from low quality. Quality frameworks and/or standards help the demand side make well-informed adoption decisions and help the supply side anchor on well-researched and efficacious practices.

Currently, there is an abundance of SEL-related frameworks in the field seeking to define best practices or standards for SEL programs and interventions. But all of the frameworks have relatively low awareness and adoption, especially compared with SEL in general. A mature market may warrant several approaches to quality, but too many are likely to cause confusion within the field and end up helping neither the supply nor the demand side.

Figure 3.1: Adoption of SEL Frameworks

Please indicate your school or district's experience with the following SEL frameworks. Please check all that apply.



Source: Tyton Partners K-12 School and District SEL Survey 2021; Tyton Partners analysis

As we discussed in Section II, SEL adoption, in general, is growing quite rapidly. But is quality framework adoption keeping pace? And is the field coalescing around a manageable group of frameworks? From the data, the answer to both appears to be no. CASEL is the most adopted SEL framework at the district level (45%), but Emotional Intelligence is the most adopted among K-5 schools (27%) and 6-12 schools (27%). The 21st Century Skills Framework displays high adoption at all three levels as well. A variety of other frameworks see adoption rates of 1%-10%. The same trends hold for majority Black and Latinx and high-poverty districts, with slightly lower adoption and awareness (see appendix for graphs with data analyzed across demographics). Sometimes, multiple SEL frameworks are in use at the same school or district, depending upon the SEL offering being used for any given grade or classroom. This realization could mean that the field is not yet coalescing around a common view of quality SEL. Or it could mean there are appropriate roles for a few different frameworks to play in the market. But either way, there is still significantly more fragmentation than what we would expect in a mature market. And both awareness and adoption are still quite low compared to overall SEL. In the school and district survey, we see more than 90% awareness of SEL broadly versus 40%-60% awareness of the most popular SEL frameworks. And likewise, a more than 80% adoption broadly versus 20%-45% adoption of the most popular frameworks. As such, from a quality perspective, we are still relatively early in the maturation of the field.

Additional Signals of Quality Implementation





One component of quality is related to alignment to SEL frameworks or standards. But how else could schools and districts think about the other aspects of SEL implementation as they relate to quality? To shed light on this question, we conducted an analysis across different types of SEL implementation models.

In our 2020 report, we used latent class analysis to identify patterns in SEL implementation. This year, we have sought to simplify our methodology and tie it more directly to the SEL Taxonomy we articulated in Section I. As such, we conducted an analysis across the three SEL implementation models presented below, which were chosen due to:

- » Being among the most commonly adopted models in practice
- » Aligning most directly with supply-side SEL offering combinations, informed by our supplier survey
- » Highlighting key options that practitioners are most likely to consider for initial implementation and funders may consider in focusing their scaling efforts on “quality”

All other models were also analyzed together against these three, in the “Other” column, to surface any differences.

Figure 3.2: SEL Implementation Model Analysis

		 Programmatic Implementation (PI)*	 PD & Curriculum	 Measurement	 Other
Categories	Evaluation metrics				
Model description		Programmatic Implementation adoption, with or without the adoption of other types of SEL	Adoption of SEL PD and SEL Curriculum, but not Programmatic Implementation, with or without other types	Adoption of SEL Measurement, but not Programmatic Implementation, with or without other types	Any other adoption model, including SEL curriculum, PD, or TA alone or in combinations not represented in the other three models
Context	Grade levels % of respondents (school & district weighted avg.)	6-12 33% (n=341)	6-12 21% (n=218)	6-12 10% (n=103)	6-12 16% (n=169)
SEL types	SEL types	C: 73% PD: 80% M: 44% PI: 100% TA: 34%	C: 100% PD: 100% M: 27% PI: n/a TA: 13%	C: 66% PD: 78% M: 100% PI: n/a TA: 16%	C: 44% PD: 54% M: n/a PI: n/a TA: 9%
Quality indicators	Progress towards the ideal SEL	71%	68%	66%	62%
	Widespread implementation*	57%	47%	44%	40%
	Formal SEL adoption**	53%	45%	44%	33%
	Cohesive SEL^	62%	57%	57%	50%
	Length of implementation	3.0 years	2.7 years	2.3 years	2.2 years
Demographics	Free and Reduced-Price Lunch Student Pop.	47%	48%	47%	47%
	% Black and Latinx	41%	45%	42%	45%
	District size	~ 37K	~53K	~37K	~54K

Notes: *Question asked respondents, “To what scale is SEL currently implemented in any capacity in your district?; **Which statement best characterizes the nature of SEL programming at your district? Formal SEL: specific programming or directives at the classroom, school or district level and Informal SEL: schools and/or individual teachers seek to incorporate SEL in an ad-hoc basis, there is no formally defined programming; ^How coherent and cohesive are the SEL programs and practices throughout your district?

Source: Tyton Partners SEL School and District Survey 2021; Tyton Partners analysis

This implementation analysis reveals two key clues about quality SEL implementation:

1. Those using Programmatic Implementation perceive higher levels on several “quality indicators” that we believe are indicative of a quality SEL implementation, including being more widespread, adoption of formal programming, higher cohesiveness of SEL programming, and implementation that has been occurring over a longer period
2. Those using Programmatic Implementation perceive statistically significant higher levels of perceived “progress towards the ideal”

While we cannot prove causation through this analysis, it does show a clear correlation between usage of Programmatic Implementation and subjective and objective measures of a quality SEL implementation.

Measuring Practitioner Sentiment: Progress Towards the Ideal

As in our 2020 report, we again used the metric of “progress towards the ideal” to understand feelings and attitudes practitioners have concerning their school or district’s SEL implementation, whatever form that may take. We accomplished this task by asking respondents to self-assess their school or district’s progress towards an ideal SEL implementation on a scale from 0%-100%.

This scale serves as a relative measure 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 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 not complex issues such as these. Still, 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.



Key Implications:

▶ Leading voices in the field of SEL, including exemplar districts, funders, and providers, should strive to come to a consensus around a basic definition of quality SEL for the field to build on, and further amplify those quality standards/frameworks that are best in class

▶ Schools and districts seeking to implement quality SEL should consider Programmatic Implementation offerings as a place to start and/or build towards

▶ Suppliers seeking to improve quality may consider expanding offerings and improving implementation support in alignment with leading Programmatic Implementation offerings



IV. Building a Sustainable Ecosystem



Key findings:

- ▶ The SEL ecosystem today is characterized by a moderately healthy supply side and a still-emerging, yet fast-growing, demand side
- ▶ 55% of providers expressed confidence in the sustainability of their organization's revenue model

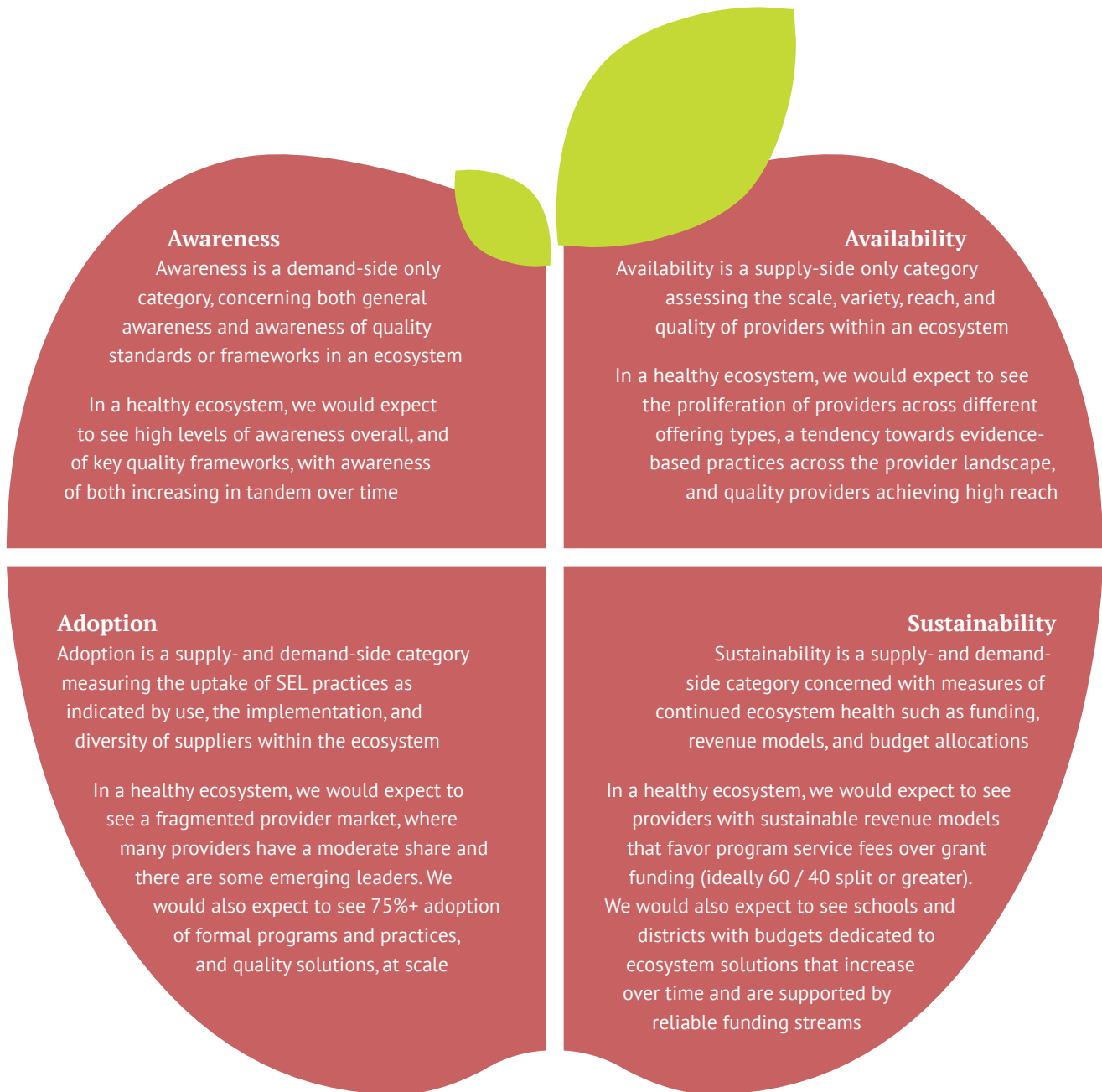
- ▶ Approximately 44% of SEL supplier ecosystem revenues today are from program service fees, with 56% coming from contributions and grants suggesting that the field isn't self-sustaining on product/service offerings sold to schools and districts alone



In our 2020 report, we introduced the idea of SEL “supplier health.” This year, we have sought to expand upon that idea and assess the health of the entire SEL ecosystem, across both the supply side and the demand side. The supply-side assessment is largely informed by our supplier survey, in addition to supplementary research and analysis of the supplier landscape. The demand-side assessment is similarly informed by our school and district survey and supplemented by conversations with experts and practitioners in the field. Overall, we find that today's SEL ecosystem is characterized by a moderately healthy supply side and a still-emerging, yet fast-growing, demand side.

What a healthy ecosystem looks like...

In a healthy ecosystem, we would expect to observe certain dynamics across four key categories related to ecosystem health: awareness, availability, adoption, and sustainability.



Each category can be evaluated on a four point scale: Low, Emerging, Moderate, or High.

SEL ecosystem health in 2021

Awareness (Moderate)

- » General SEL awareness is near unanimous across districts and schools (90%+), but awareness of quality frameworks is just moderate at districts (60% awareness of CASEL Core SEL Competencies) and still emerging among schools (~35% in K-5, 32% in 6-12)
- » Given the state of overall SEL awareness, the ecosystem would now benefit most from driving awareness of quality frameworks and further articulating what “quality SEL means”

Availability (Moderate)

- » SEL availability is characterized by much variety across the taxonomy and growing participation from Programmatic Implementation and Core Curriculum providers, the latter of whom are starting to invest more heavily into SEL
- » Room for improvement remains for providers to increase their evidence base (only 37% of those surveyed have conducted third-party quantitative studies with a comparison group). And for the creation of more offerings with approaches that better integrate into school curriculum and culture, such as embedded learning and schoolwide practices.

Adoption (Emerging)

- » SEL adoption is in some ways a tale of two perspectives, with different dynamics at play across the supply side and the demand side. The supply side, which largely deals with market fragmentation, is quite healthy. However, the demand side is still very much emerging as the market continues to gain traction and grow.
- » From a supply-side perspective, adoption dynamics today create a healthy, highly fragmented marketplace: there are many providers with moderate share, and some emerging leaders
- » Notably, due to the fragmented nature of the market, even leading SEL providers have limited reach (e.g., Second Step leads 6-12 schools at 8.3% usage), implying that core curriculum providers could quickly reach three-to-four-times the students with embedded SEL if they continue to invest in SEL at current rates
- » On the demand-side, adoption is still emerging, with levels varying from 10% to over 70% depending on the type of SEL and the level at which it is being adopted (e.g., K-5, 6-12, District)

Adoption (Emerging)

- » SEL PD and SEL curriculum are the leading categories of SEL adoption, used in 71% and 67% of districts, respectively. Programmatic Implementation is used in 42% of districts, measurement in 29%, and Technical Assistance in 24%. Adoption is generally lower across the board for K-5 and 6-12 schools.
- » Notably, adoption has increased across schools, especially in 6-12, since our 2020 study

Sustainability (Moderate)

- » The sustainability of the SEL market is in satisfactory, near-term shape, but some of the underlying dynamics point to potential long-term challenges, accounting for our assessment of “moderate” today
- » Similar to the 2020 report, we see that ~44% of SEL supplier ecosystem revenues are from program service revenue versus grants. In a mature market, we would want that number to be closer to 60%, as program services revenues are typically more sustainable in the long term. Notably, Technical Assistance and Programmatic Implementation providers are the largest drivers of this imbalance, with just 21% and 28% of revenues, respectively, coming from program service fees. PD and Measurement providers are better, with 54% and 58% of revenues coming from program service fees. And SEL curriculum providers are relatively sustainable today, with 71% of revenues coming from program service fees.
- » Of those surveyed, 55% of providers felt confident in their revenue model, and only 48% felt there was adequate funding for SEL to support growth
- » Driven by federal funding dollars and the shifts in strategic priorities discussed in Section II, we saw a near-unanimous, 95%, of districts indicate that their SEL budget had either increased or stayed the same in this past academic year, and 97% expected the same for next year. These results include a weighted average growth in SEL budgets of 21%, much higher than the 3% growth anticipated in our 2020 report.
- » This academic year, federal stimulus dollars were tied for the second most used funding stream to support SEL in districts among survey respondents (36%), alongside Title I dollars (36%), and behind local district operating budgets (48%)
- » Next academic year, federal stimulus dollars are projected to be the most used source of funding for SEL among school and district survey respondents (45%), ahead of local district operating budgets (44%) and Title I (30%)

Long-Term Sustainability Is Not Guaranteed Without Action

The SEL ecosystem today is flush with dollars from grant funding and federal stimulus programs, but long-term sustainability is far from guaranteed. Districts are heavily reliant on federal stimulus dollars to fund SEL programming, as it is the second most used funding stream for SEL this year among schools and districts (36% of survey respondents) and projected to be the top funding stream next year (45% of survey respondents). But once that funding stops, adoption may be impacted, especially given that the rapid growth of the past couple of years was supported by that additional funding. Districts will need to ensure there are line items in local operating budgets to support continued and improved SEL programming. However, there are other paths to sustainability, including pursuing embedded SEL programs and practices, where SEL spend essentially becomes interwoven with spending on the core curriculum, general professional development, and other staples of school operations.

On the supply side, the biggest threats to sustainability are reliance on grant funding with unsustainable revenue models. As mentioned above, ~44% of SEL supplier ecosystem revenues today are from program service fees, with 56% coming from contributions and grants. Programmatic Implementation providers are even more reliant on grants than the average provider, with 72% of their revenues coming from contributions and grants. This data implies these providers are not being supported sufficiently by the demand side's ability to pay and are instead heavily reliant on the discretion of a handful of funders. While we believe there will always be an important role for grant funding in the SEL ecosystem, we view a 60% reliance on program service fees as more sustainable in the long run.

Relatedly, 45% of SEL providers surveyed indicated negative or neutral sentiment when asked if they were confident in the sustainability of their revenue model. Given the emerging nature of the ecosystem, that is not surprising, but it does point to a need for about half of SEL providers to develop more sustainable revenue models. As the ecosystem grows and matures, it will be important for more providers to develop sustainable revenue streams—such as those reliant on program service fees—to help ensure longevity and effectiveness.



Key Implications:

- ▶ The health of the SEL ecosystem could benefit significantly from increased awareness and adoption of quality standards and frameworks, and so it is in the best interest of all stakeholders to support this continued development
- ▶ SEL providers need a roadmap to guide the development of more sustainable revenue streams to ensure future sustainability
- ▶ Schools and districts need to develop dedicated budgets to support continued SEL spending once federal stimulus money runs out
- ▶ Despite the rapid growth of the past year, adoption of more formal programs and practices are still emerging; schools and districts will require continued encouragement and guidance to continue scaling and deepening adoption (documenting outcomes of SEL programs against specific goals and communicating impact is one common way to build buy-in)



This report has demonstrated that SEL itself has found its place in the K-12 ecosystem and it's clear that it will play a leading role in improved outcomes moving forward. While the COVID-19 pandemic and attention to racial injustices has propelled near-term attention and fueled explosive growth in K-12 schools and districts, a robust history of innovation and efficacy research in programs, policy and practice, some of which has been highlighted in the foreword to this report, has demonstrated SEL's positive impacts on long-term academic growth and students' social emotional health and well-being. The calls to action for school and district leaders, funders and providers outlined in this report are only the beginning of the opportunities and challenges to be collectively addressed in this rapidly evolving and developing ecosystem that is now placed front and center in K-12 education – where hopefully it can stay, grow and mature as a core part of the system going forward.

Appendix

Survey Approach

This report is informed in large part by two primary research surveys conducted during the spring of 2021, one focused on the demand side of the SEL ecosystem and one focused on the supply side.

Supply-side survey

The 2021 Tyton Partners Social Emotional Learning Supplier Survey elicited 121 responses in total. The survey targeted social emotional learning suppliers, with a primary focus on K-12. It was distributed with assistance from the Bill & Melinda Gates Foundation, CASEL, and New Profit. Most responses were fielded between April 20, 2021, and May 7, 2021, though a small selection of responses was fielded later during June, July, and August.

Demand-side survey

The 2021 Tyton Partners K-12 Social Emotional Learning School and District Survey elicited 2,053 responses in total, including 882 school administrators and staff, 328 district administrators and staff, and 780 teachers. The survey targeted a nationally representative sample of roles across each of these three groups. Major respondent types included Guidance Counselors, Teachers, Superintendents, Social Workers, and Principals. In addition to these titles, we surveyed an additional 15 roles across schools and districts inclusive of Curriculum Directors and Special Education Directors. The survey was in the field from May 6, 2021, through May 19, 2021.

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”

A note on School and District Survey demographics:

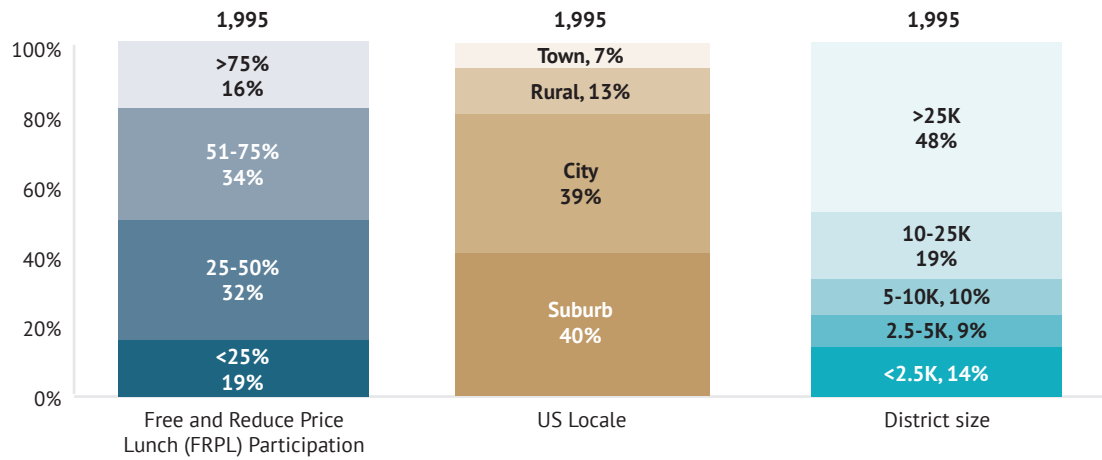
Based on the full response set, the 95% confidence interval is + / - 4% for questions asked of respondents at the district level, + / - 3.3% for questions asked of respondents for schools in grade levels K-5, and + / - 2.7% asked of respondents for schools in grade levels 6-12. Questions that were addressed 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 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). Our overall findings across the sample are largely consistent for each demographic segment, though we have sought to highlight throughout the report any instances where there is significant differentiation. These additional analyses can be viewed in Appendix C.

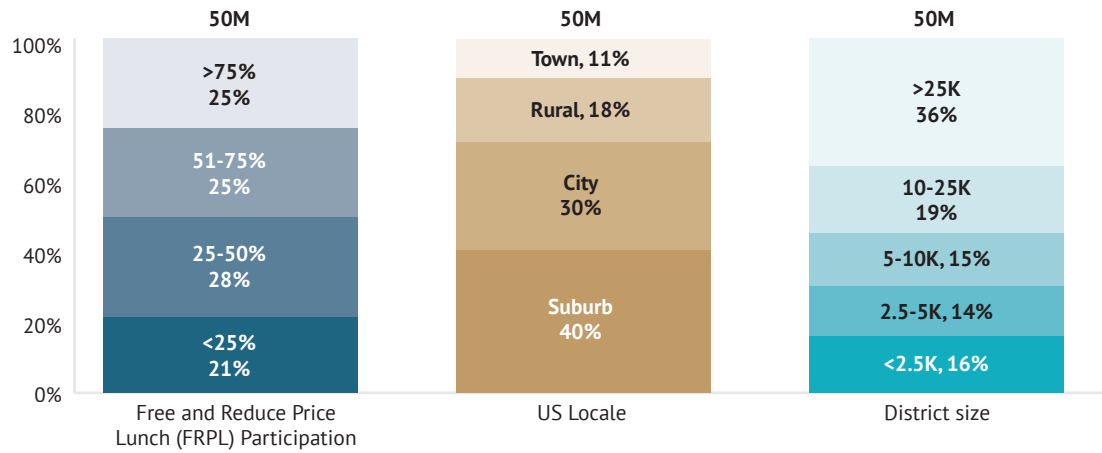
Appendix A

Survey Demographics

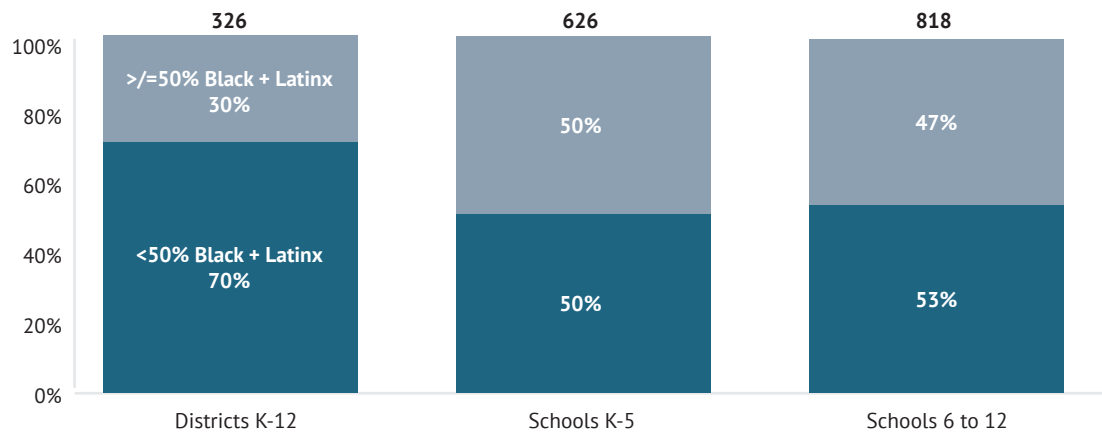
School and district survey demographics



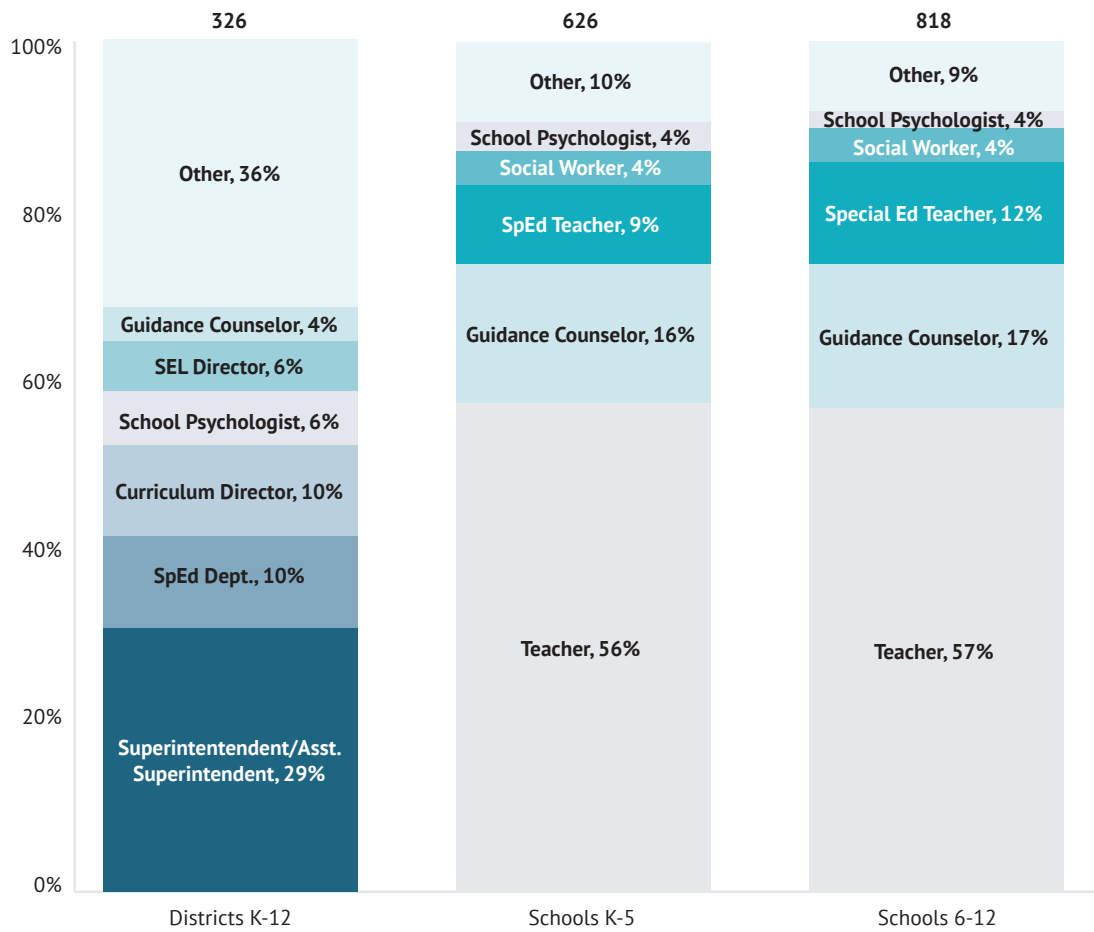
U.S. Public School Students, 2018-2019 (NCES)



District Race by School/District Level

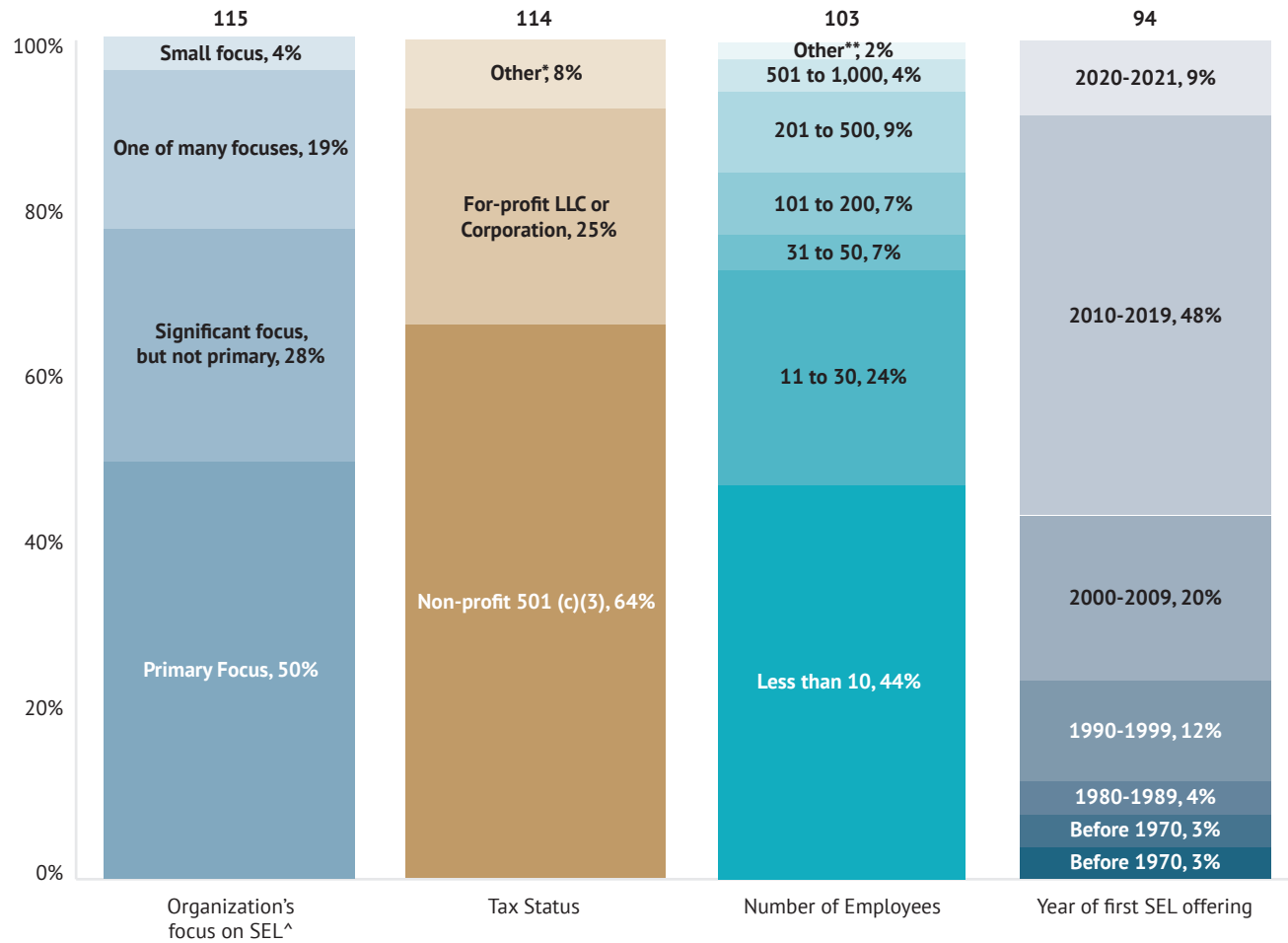


Role by School/District Level



SEL Supplier Survey 2021 respondent demographics

SEL supplier survey demographics



Note: *Other tax status include publicly funded organizations, B-corps, and social welfare groups;

**Other number of employees includes organizations larger than 1,000 employees

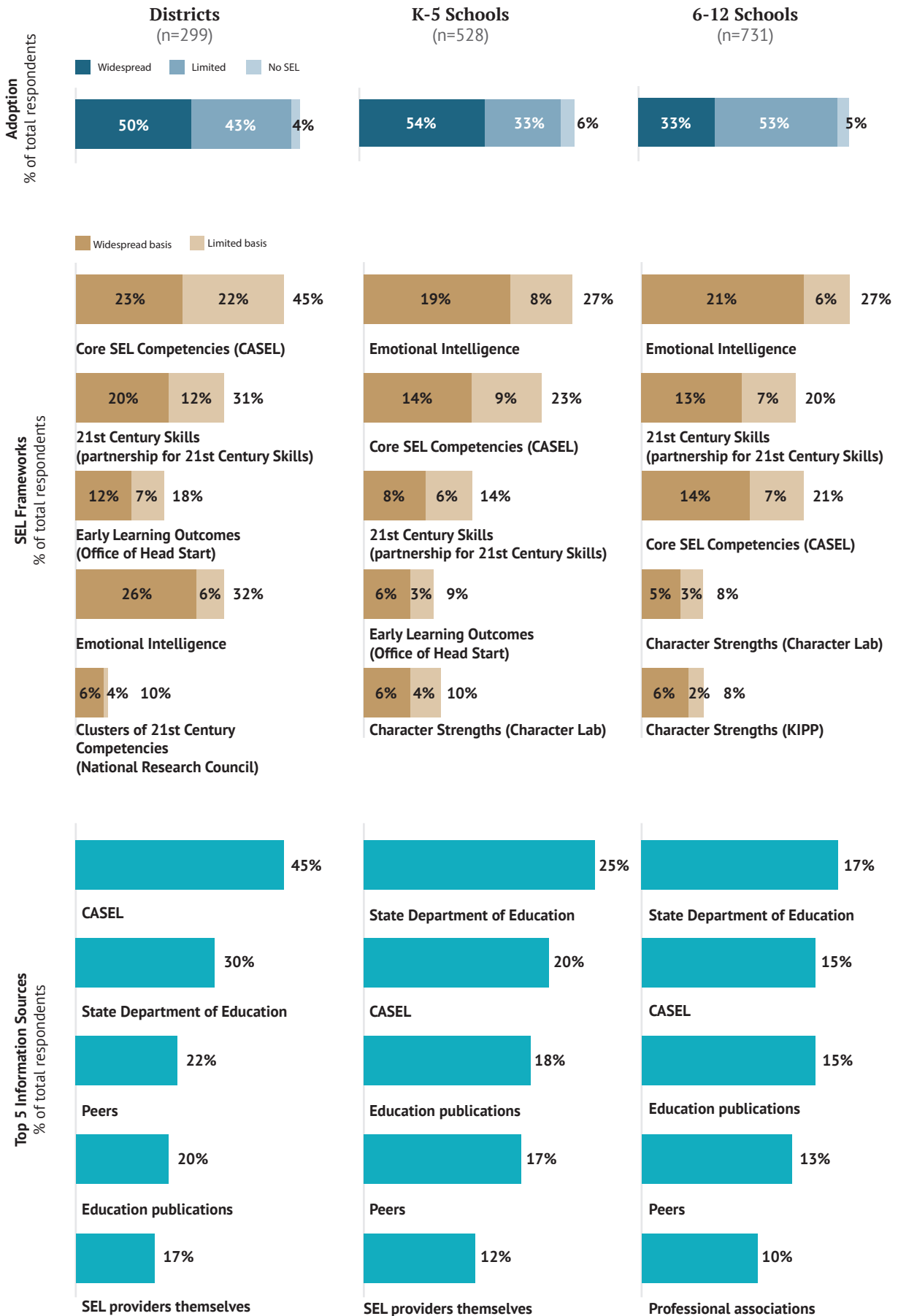
[^]Question prompted respondents accordingly: "How would you describe your organization's focus on SEL?"

Appendix B

SEL is a \$765M market with a 93% district adoption and 87% K-5 school adoption and 87% 6-12 school adoption

Definition: 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: \$765M

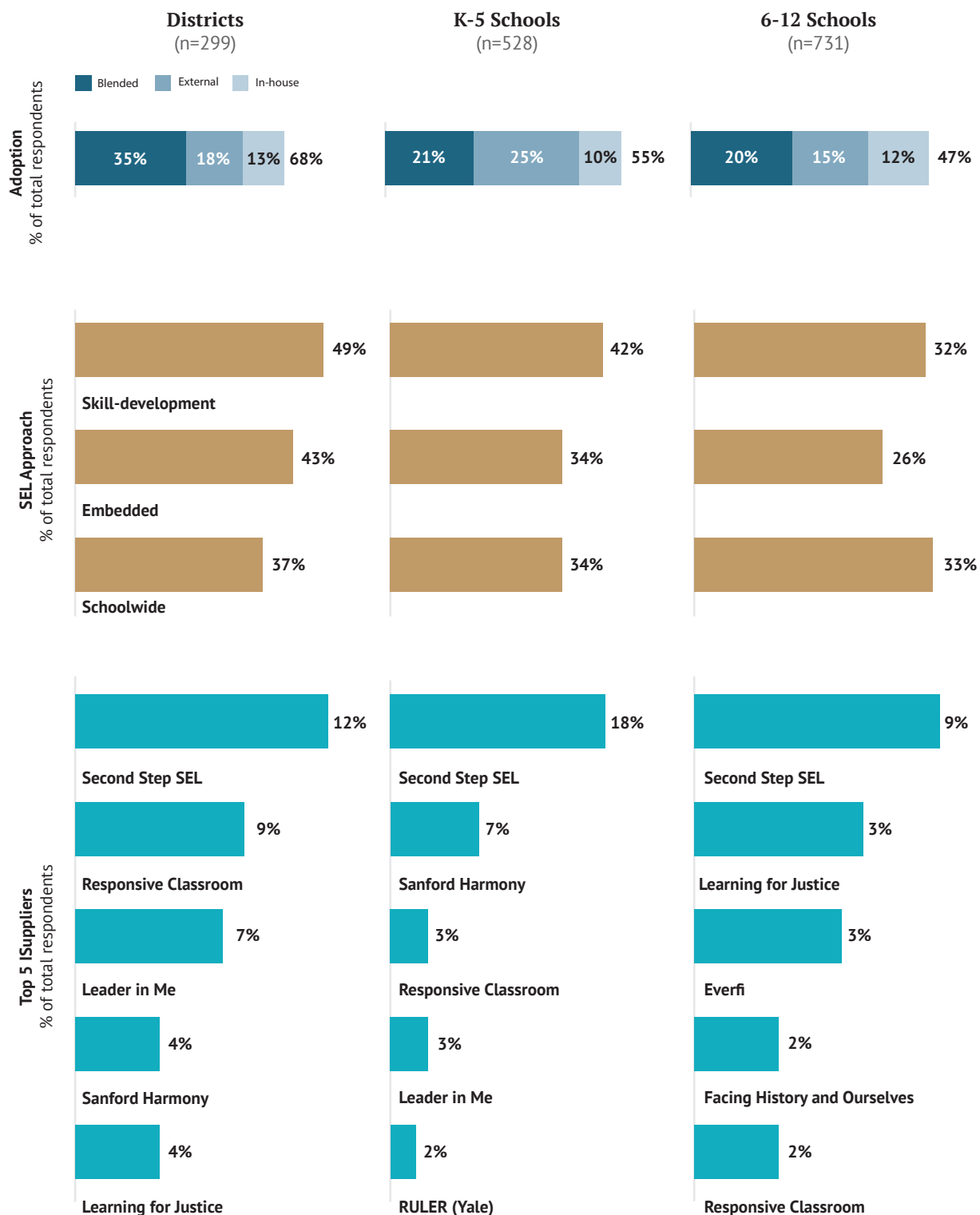


Curriculum is a \$189M market with a 68% district adoption and 54% K-5 school adoption and 45% 6-12 school adoption

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 embedded SEL components, or practices in and outside of the classroom guiding SEL-related schoolwide culture and learning conditions.

Market Size: \$189M

Annual Spend (Average): \$11.00 per student

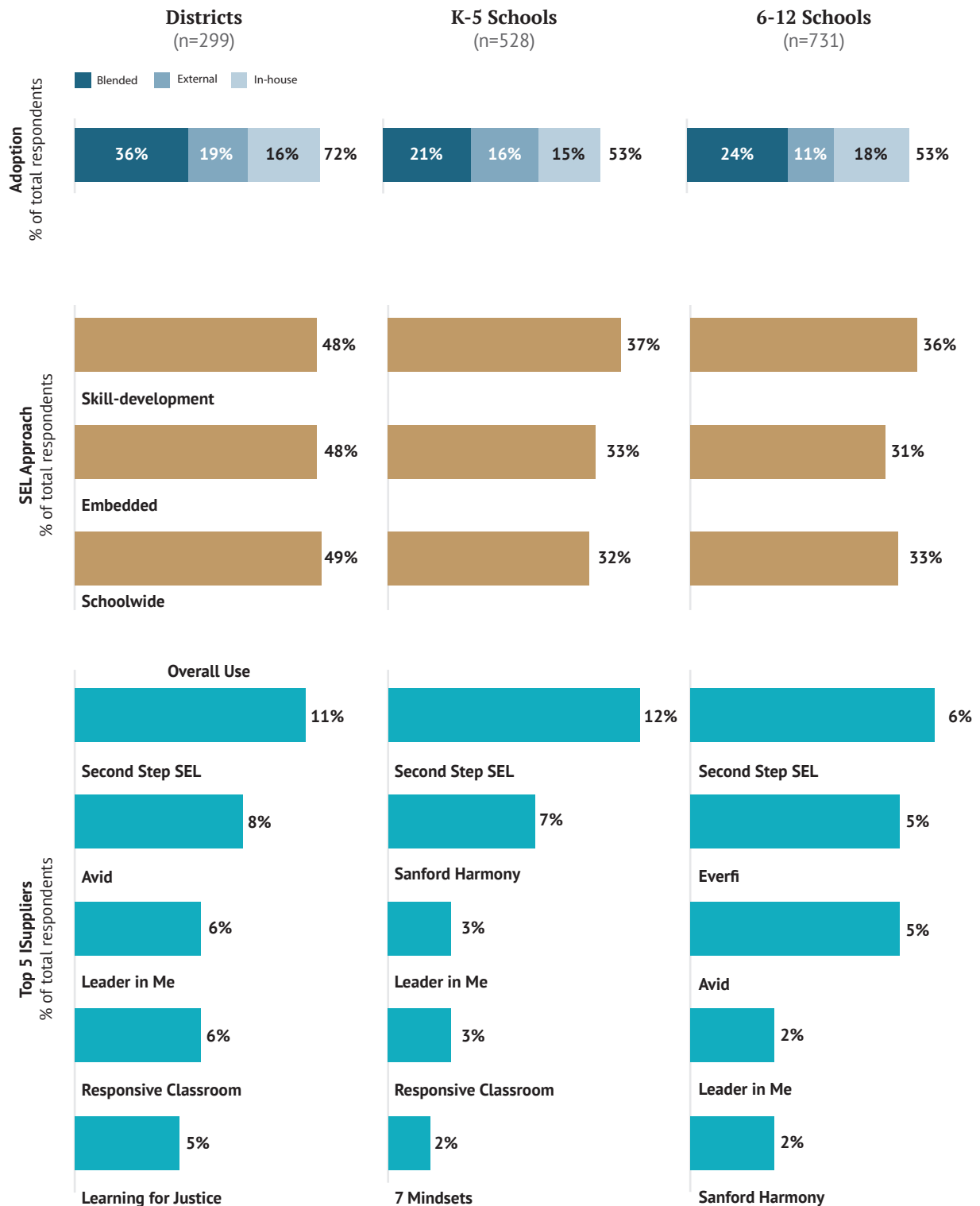


Professional Development is a \$142M market with a 72% district adoption and 52% K-5 school adoption and 51% 6-12 school adoption

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 schoolwide behaviors or practices

Market Size: \$142M

Annual Spend (Average): \$125.00 per teacher

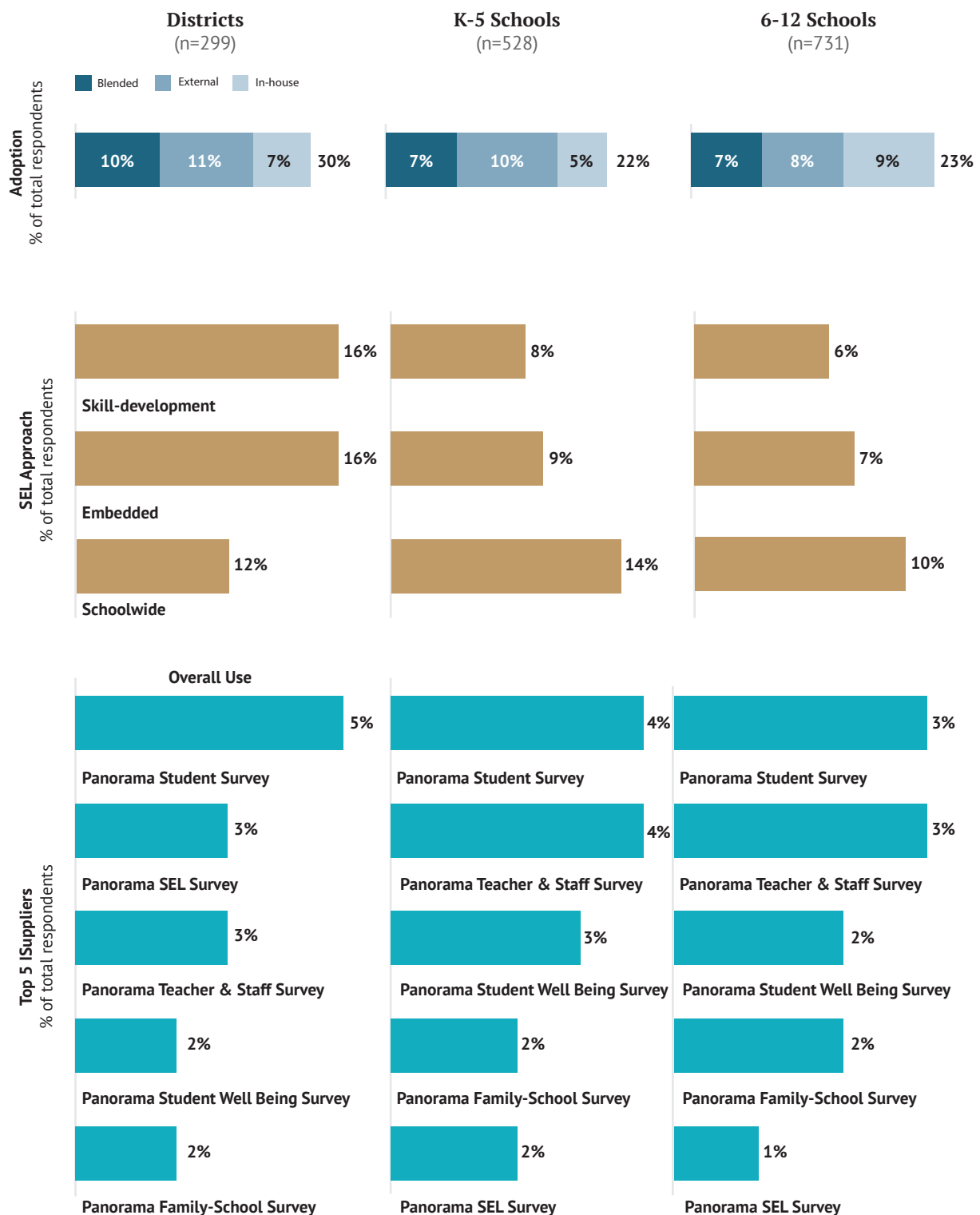


Measurement is a \$69M market with a 30% district adoption and 22% K-5 school adoption and 23% 6-12 school adoption

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: \$69M

Annual Spend (Average): \$9.00 per teacher

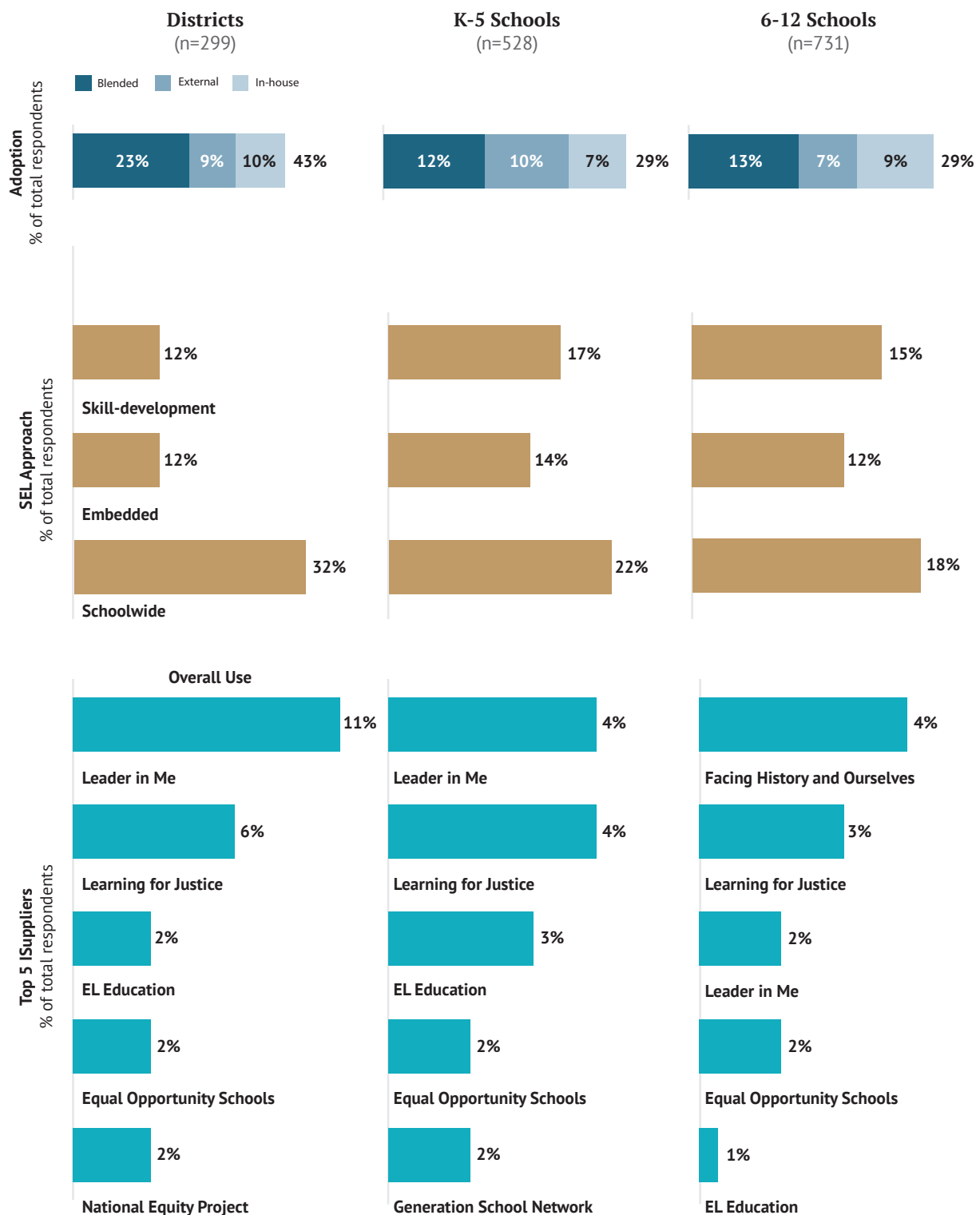


Programmatic Implementation is a \$302M market with a 43% district adoption and 29% K-5 school adoption and 29% 6-12 school adoption

Definition: Refers to comprehensive, schoolwide 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 classrooms, or on school climate or safety

Market Size: \$302M

Annual Spend (Average): \$15,000 per school

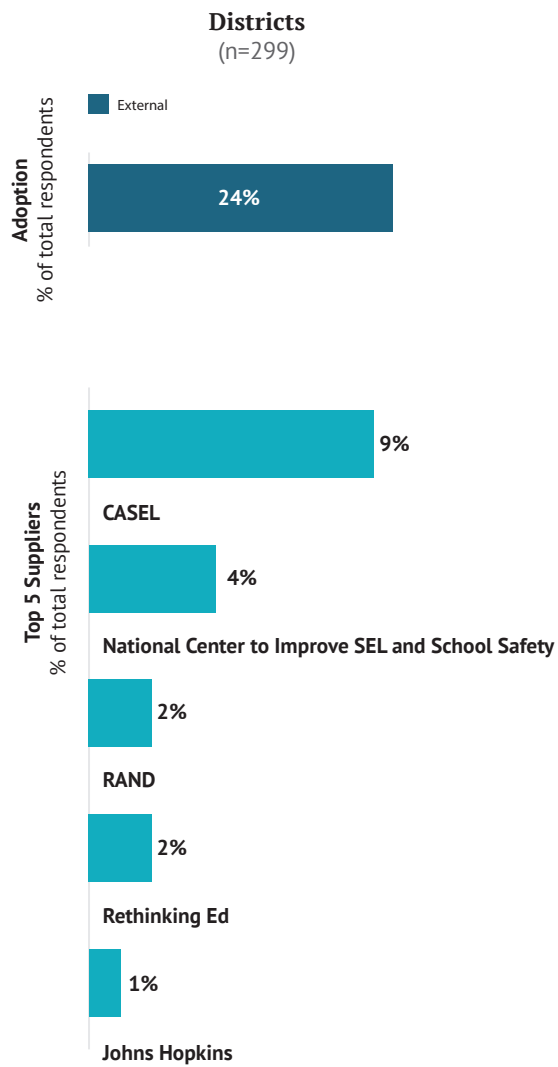


Technical Assistance is a \$63M market with a 24% district adoption

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: \$63M

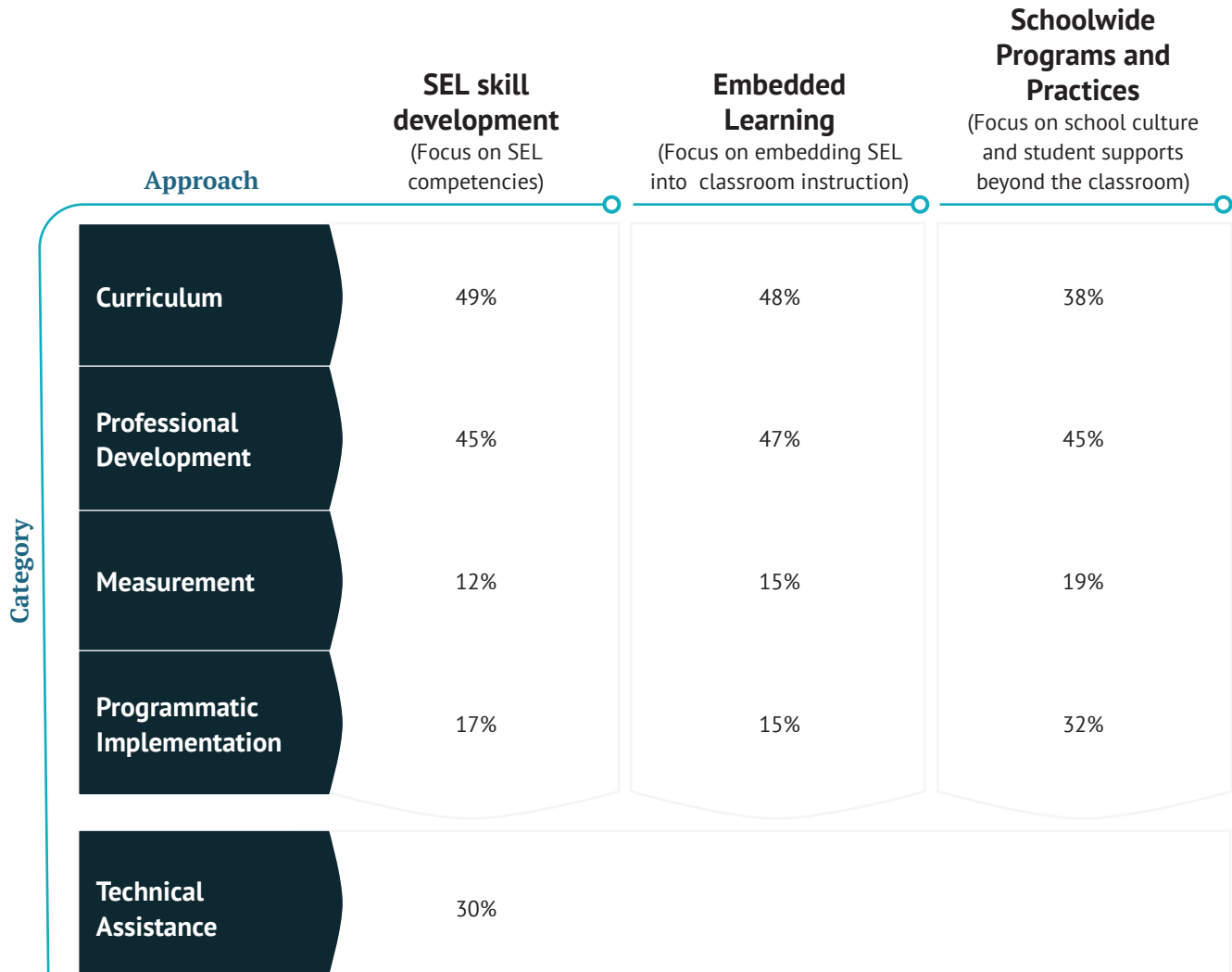
Annual Spend (Average): \$5,000 per school



Appendix C

Figure 1.2a: SEL adoption across the taxonomy at the district level

SEL programs and practices in majority Black and Latinx districts*
(n= 86)



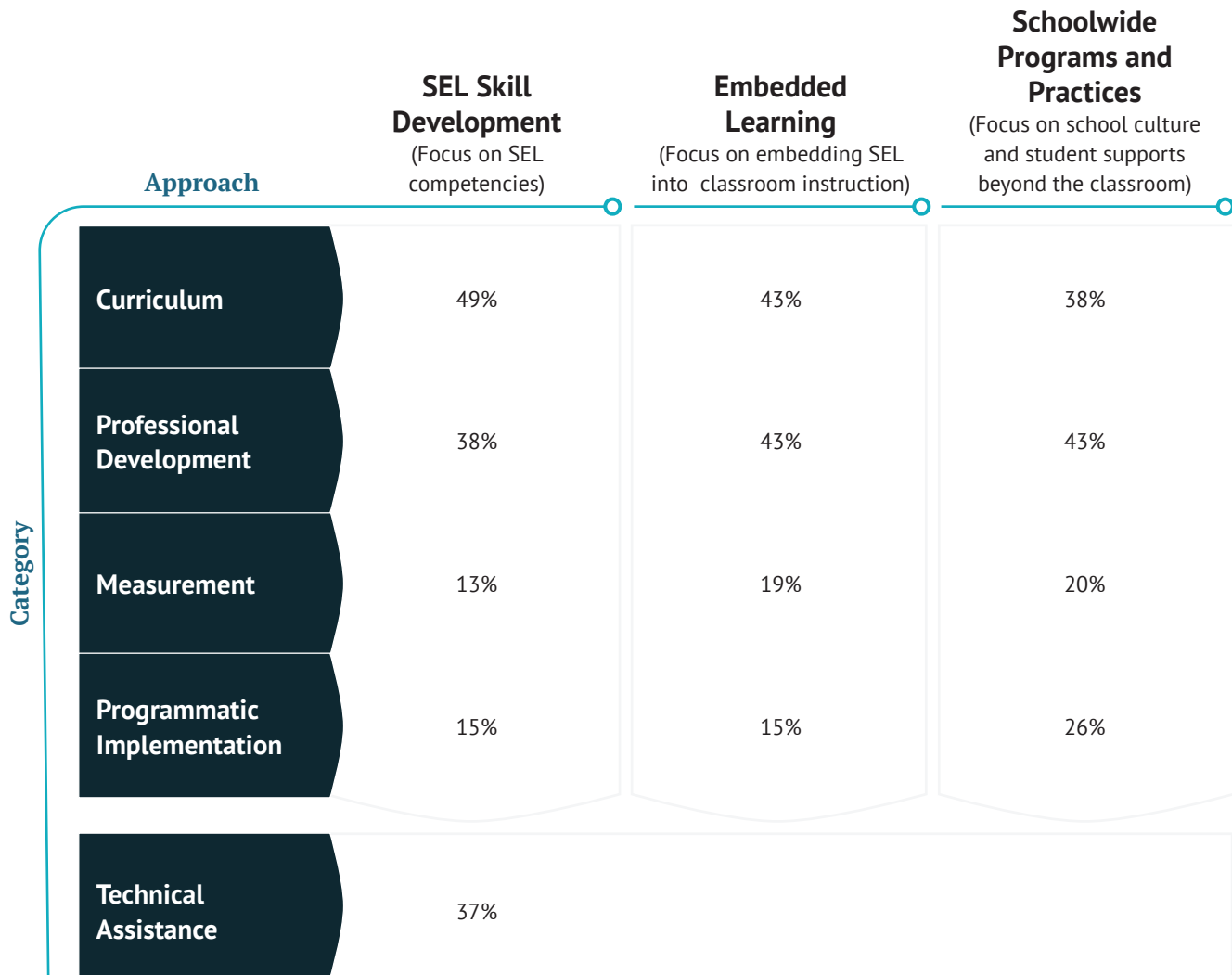
Notes: *Question asked respondents to, "Please indicate in the grid below all of the types of SEL programs and practices, if any, in use in your district."

Source: Tyton Partners SEL Supplier Survey 2021; Tyton Partners analysis

Figure 1.2b: SEL adoption across the taxonomy at the district level

SEL programs and practices in high poverty districts (>75% FRPL)*

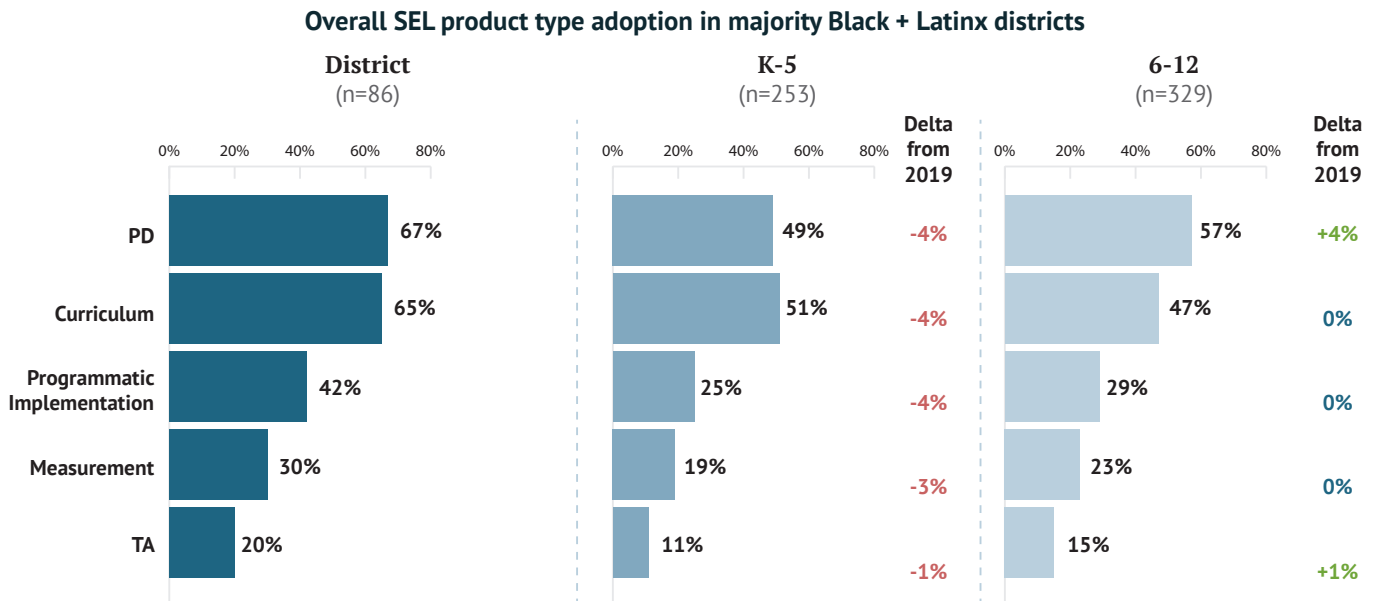
(n= 53)



Notes: *Question asked respondents to, "Please indicate in the grid below all of the types of SEL programs and practices, if any, in use in your district."

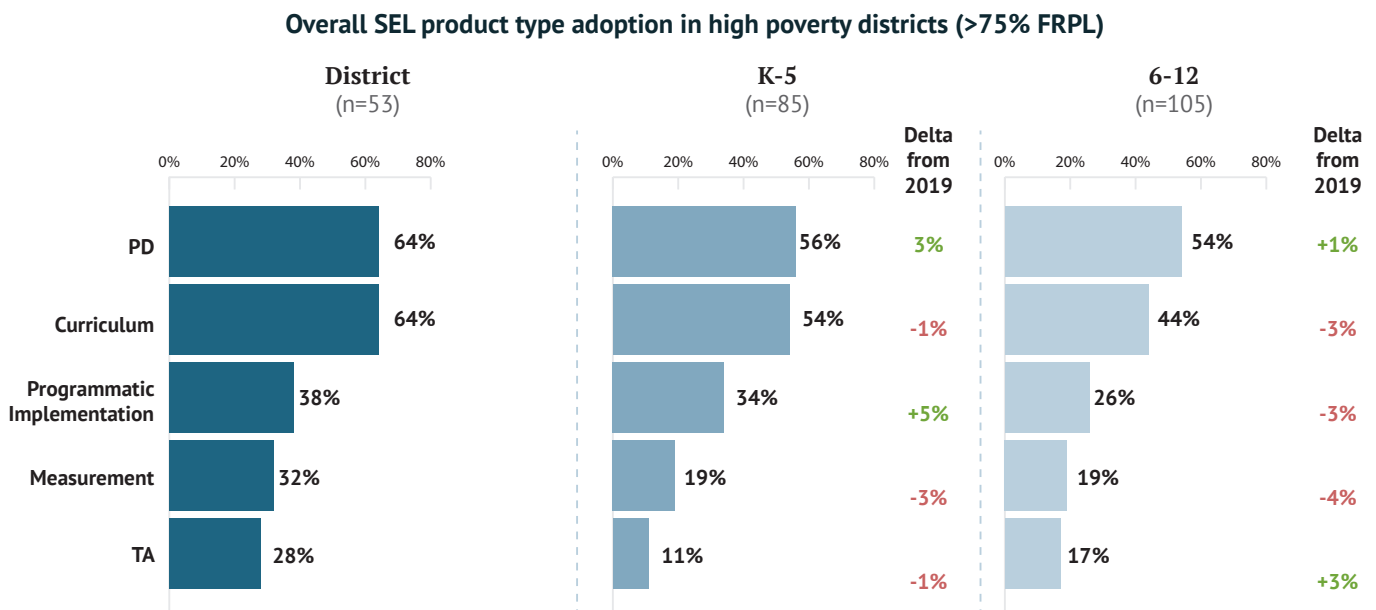
Source: Tyton Partners SEL Supplier Survey 2021; Tyton Partners analysis

Figure 1.4a: SEL Adoption and Delta vs. Nov 2019



Source: Tyton Partners SEL Supplier Survey 2021; Tyton Partners analysis

Figure 1.4b: SEL Adoption and Delta vs. Nov 2019

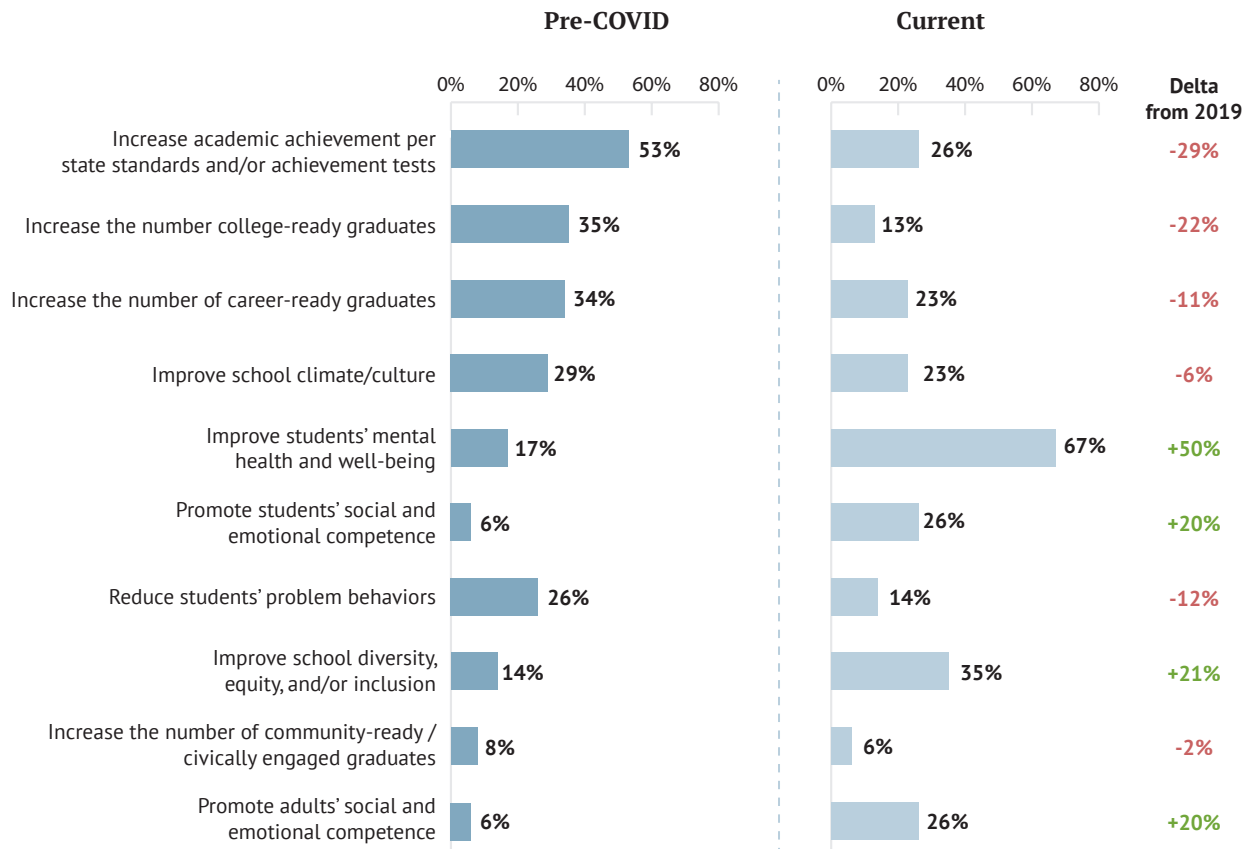


Source: Tyton Partners SEL Supplier Survey 2021; Tyton Partners analysis

Figure 2.1a: School and District Strategic Priorities Pre-COVID vs. Today

Among the issues highlighted below, what are the most important strategic priorities for your district across the following time periods? Please select up to three per time period. (Black + Latinx districts)

(n= 86)

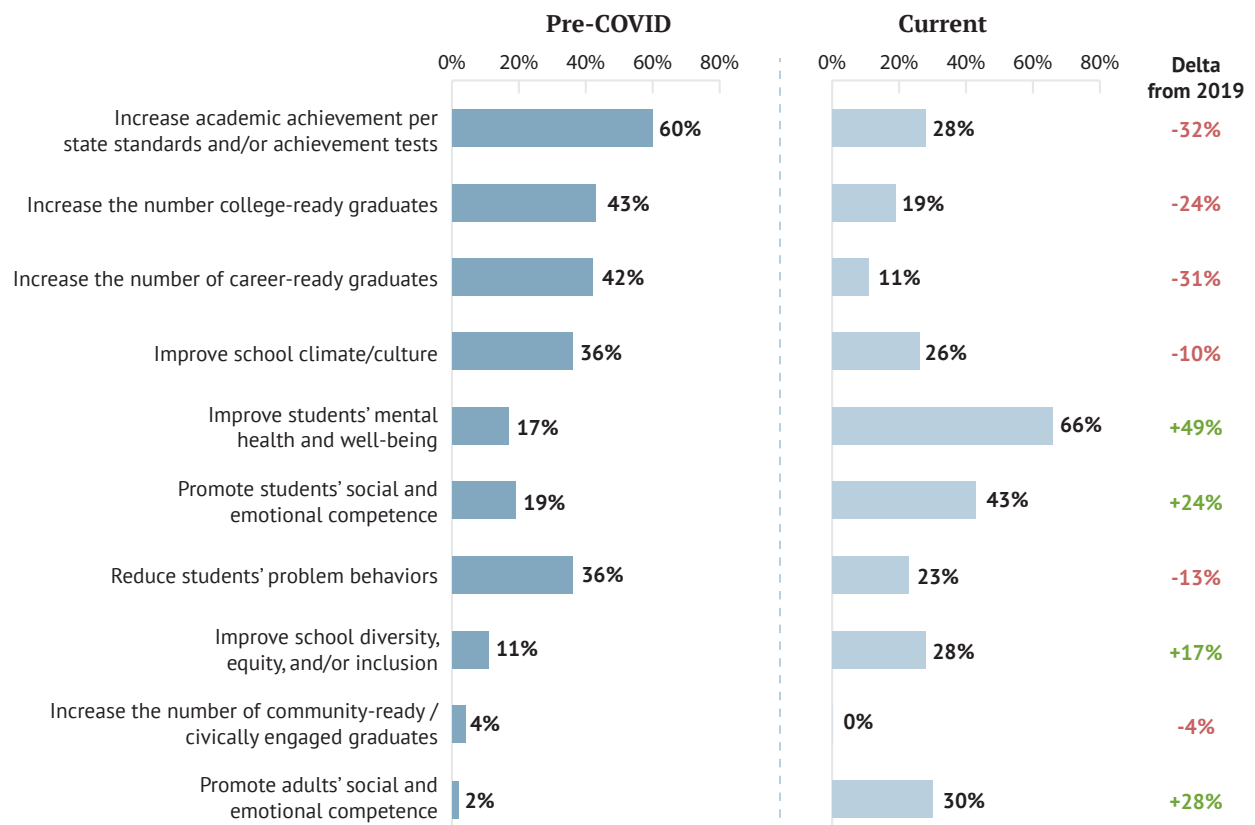


Source: Tyton Partners K-12 School and District SEL Survey 2021; Tyton Partners analysis

Figure 2.1b: School and District Strategic Priorities Pre-COVID vs. Today

Among the issues highlighted below, what are the most important strategic priorities for your district across the following time periods? Please select up to three per time period. (High poverty districts (>75% FRPL))

(n= 53)



Source: Tyton Partners K-12 School and District SEL Survey 2021; Tyton Partners analysis

Figure 3.1a: Adoption of SEL Frameworks

Please indicate your school or district's experience with the following SEL frameworks.
Please check all that apply. (Majority Black or Latinx)

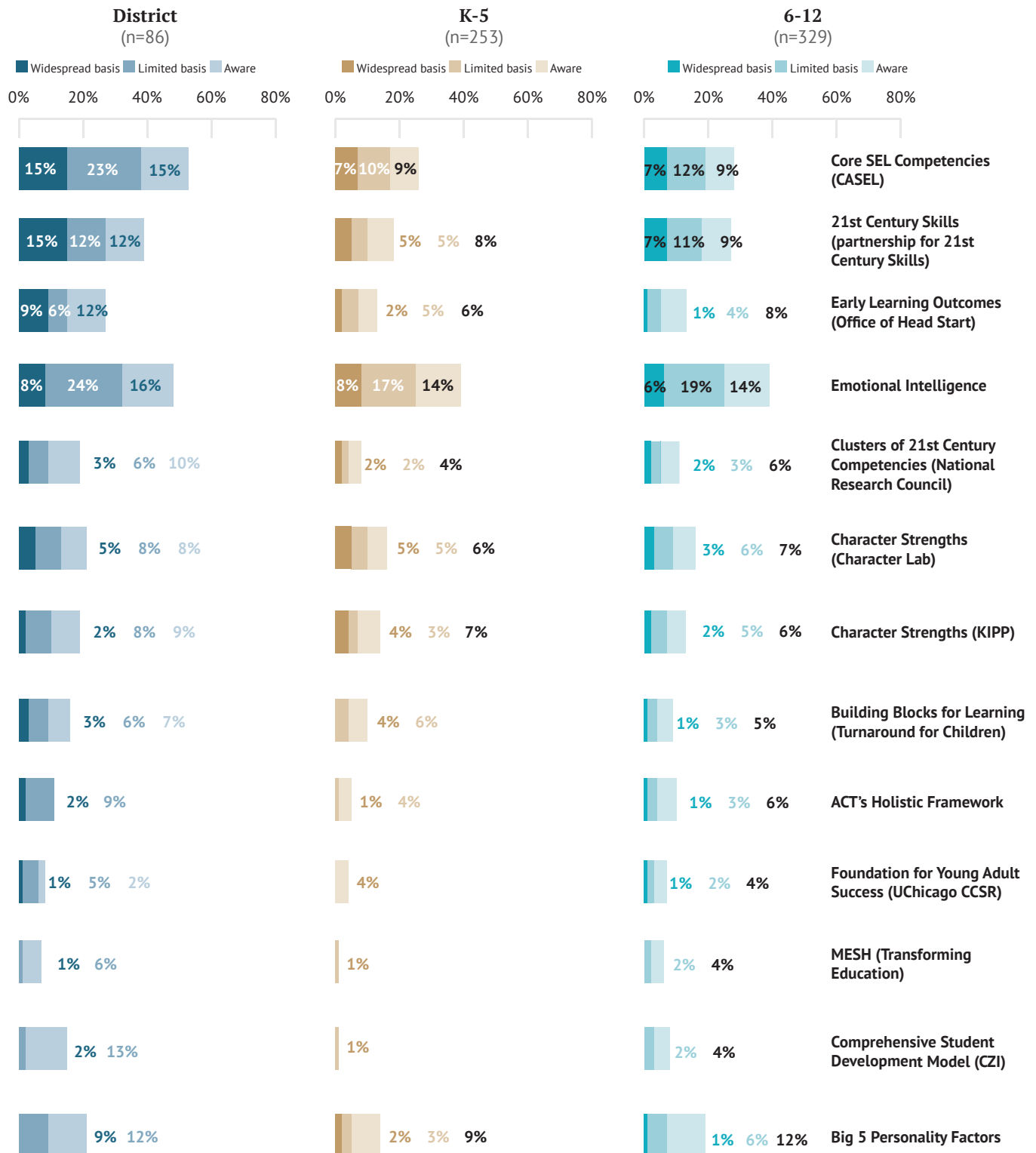


Figure 3.1b: Adoption of SEL Frameworks

Please indicate your school or district's experience with the following SEL frameworks.
Please check all that apply. (High poverty districts (>75% FRPL))

