



Connecting Students & Volunteers
for Results that Count

2017 ANNUAL REPORT



“ The greatest gift ever is the time that they spend with me. ”

2nd grade student at Billingsville Leadership Academy



2017 ANNUAL REPORT

October 2017

Dear Heart Donors and Financial Partners,

Thank you! Your support is providing Charlotte elementary students with critical math skills and academic confidence. Thanks to you, hundreds of Heart students are met at the classroom door twice per week by tutors ready to offer encouragement and targeted support.

In this report, our team wants to share the impact your support is making.

First, you'll see 2016/17 program results. Collectively, your donations provided 13,082 hours of one-on-one, aligned instruction to students in Charlotte-Mecklenburg Schools that would not otherwise have been available. An impressive 98% of students met growth goals in math, set with guidance from elementary math specialists at CMS and UNC Charlotte.

You'll also see an update on 2017 tutor recruitment. Our 12 school partners have now grown to 17, requiring weekly tutors for 850 Heart students. Your donations make it possible to recruit and keep these tutors, with a Program Coordinator and structured curriculum at each school site.

Foundational math skills matter for high school graduation, post-secondary options, and economic opportunity—especially in the high-poverty schools that Heart serves. Our team sees firsthand the impact of every hour volunteered and dollar invested. In the pages that follow, I hope you will see as we do the impact of your generosity.

It is with joy that we share the 2017 Annual Report with you – who make this work possible.

With gratitude,



Emily Elliott
Executive Director, Heart Math Tutoring
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eelliott@hearttutoring.org

YOUR IMPACT ON STUDENTS

The Need for Math Proficiency

Only **44%** of economically-disadvantaged students in CMS performed on grade level in math on 2017 NC End of Grade tests. Many students rely on memorized rules and lack concrete understanding, leaving them unprepared for more abstract math, like algebra. **Math matters for academic confidence, high-school graduation, and post-secondary and career opportunities.**



Algebra I is a high school graduation requirement, and preparation is critical¹.

AMONG THOSE WHO FAILED ALGEBRA I

20% Only 20% passed after retaking the course, and

9% Only 9% passed on a third take

70% of U.S. jobs require a high-school diploma².

\$26,000

is the median salary without a high-school diploma³.

40% of U.S. companies now report difficulty in filling STEM positions, due to lack of skills⁴.

\$53,000

is the average pay for STEM jobs⁴.

Leading on Opportunity



Charlotte recently ranked **50 out of 50** in a study of economic mobility, with **segregation, social capital, and public-school quality** named as factors⁵. In 2017, the Charlotte-Mecklenburg Opportunity Task Force made recommendations for Charlotte including using focused strategies to **“coordinate an army of community volunteers** committed to connecting more children, youth, and families to knowledge, resources, and opportunities⁶.”

“Heart helped build the confidence of the students. They were able to **build relationships** outside of the classroom **with people who truly cared** and the students looked forward to that connection. Their math scores increased along with their confidence.”

Maria Clodfelter, Teacher at Billingsville Leadership Academy

Building Social Capital



Before each tutoring session, Will Funderburg shared with his student Anaiya* about his morning run. Anaiya wanted to be a runner like Will, so she joined Girls on the Run!



Heart volunteer Connie Henderson was paired with Mouna* for two consecutive years. After travelling to Australia, Connie used a globe to show Mouna where she had been.

**Names have been changed.*

1. Study by the Center for the Future of Teaching and Learning at West Ed (2012)
2. U.S. Bureau of Labor Statistics, Occupational Employment Statistics (2013)
3. U.S. Bureau of Labor Statistics, Current Population Survey (2017)
4. Brookings Institution, Still Searching: Job Vacancies and STEM Skills (2014)
5. Harvard University/UC Berkeley, Where is the Land of Opportunity? The Geography of Intergenerational Mobility in the United States (2014)
6. The Charlotte-Mecklenburg Opportunity Task Force Report (2017)

Improved Foundation in Math

98%

- ▶ 98% of 2016/17 Heart students met program growth goals in math, set with guidance from elementary math specialists at UNC Charlotte and

Charlotte-Mecklenburg Schools (CMS), and based on research-based assessments used nationally.

- ▶ Collectively, students grew from mastering 26% to 59% of the building block skills needed based on grade level standards. Skills include counting, more vs. less, place value, and others.



Improved Enthusiasm for Academics

94%

- ▶ 94% of teachers reported an increase in student confidence or enthusiasm toward math because of Heart's program.

- ▶ 96% of surveyed Heart volunteers believe they had a positive influence on students' confidence about or understanding of math.
- ▶ Benefits to students from teacher surveys include:

Participate more in class discussions

Are excited and confident after tutoring sessions

Can better articulate reasoning behind answers



External Evaluation: UNC Charlotte Urban Institute

More details available soon at hearttutoring.org/results

Reemprise Fund sponsored a third-party study of Heart's results conducted by UNC Charlotte's Urban Institute. The study examines outcomes of 386 Heart students in the 2015/16 school year compared to a matched comparison group.

Key Positive Findings

- ▶ Heart students experienced improved proficiency on EOG math exams. A higher percentage of Heart students than the comparison group improved their math EOG achievement level in 2016.
- ▶ Heart students' growth from Fall to Spring on NWEA MAP tests in math was significantly higher than the comparison group.
- ▶ Heart's internal program assessments are associated with CMS standardized test measures (EOGs).

The mission of Heart Math Tutoring is to ensure that all students develop the **strong foundation in math** and **enthusiasm for academics** needed for long-term success, by helping schools use volunteers as tutors.

2016/17 PROGRAM RECAP

Thanks to support from generous donors and volunteers, more than **750 tutors** worked one-on-one with **643 elementary students** across twelve high-poverty schools in 2016/17. Thank you for helping more students build a **strong foundation in math** and **enthusiasm for academics!**

School Partners

Students in grades 1-5 at twelve partner schools received tutoring for 30 minutes, twice per week, from September to May. Student outcomes related to improved math skills and academic confidence are listed on the prior page.

- ▶ Billingsville
- ▶ Greenway Park
- ▶ Highland Renaissance
- ▶ Merry Oaks
- ▶ Montclair
- ▶ Nathaniel Alexander
- ▶ Piney Grove
- ▶ Pinewood
- ▶ Sedgefield
- ▶ University Meadows
- ▶ Westerly Hills
- ▶ Winterfield



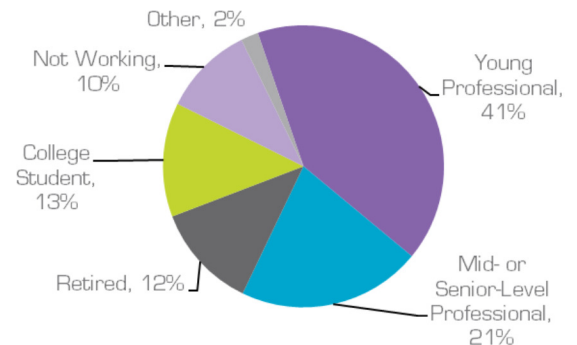
Volunteers

100%

of surveyed volunteers reported having a positive experience (68% response rate, >500 responses).

- ▶ 99% would recommend tutoring with Heart to friends and colleagues.
- ▶ Heart volunteers reported that they are more likely to donate to causes supporting high-poverty schools (63%), advocate for increased government funding for public schools (59%), and read articles about K-12 education (60%).

750 Weekly Tutors



37% Male

63% Female

Key Volunteer Partners in 2016/17



87 tutors



185 tutors



58 tutors



30 tutors



45 tutors



22 tutors



58 tutors



“ This was an amazing experience, helping and watching the students grow in their math skills and confidence levels. I would tell anyone looking for a valuable and rewarding volunteer opportunity to be a Heart tutor. ”

2016/17 Heart Tutor at Greenway Park Elementary

Myers Park Presbyterian Church (22), Elevation Church (14), Teach For America Alumni & Staff (14), Global Endowment Management (10), Christ Central (10), Patterson Pope (9), South Park Rotary (9), Myers Park United Methodist Church (8), Duke Energy (7), K&L Gates (7), McGuireWoods (7), Park Road Baptist (7), St. John's Baptist Church (7), BlackArch Partners (6), Christ Church (6), Davidson Alumni (6), Junior League (6), St. Andrews (6), Cottingham Chalk Hayes (5), Fifth Third Bank (5), Matthews United Methodist Church (5), Pamlico (5), Selwyn Presbyterian (5), TIAA (5), and many others.

Building Skills and Confidence

Third grader *Emanii** started Heart over two grade levels behind in math. Working one-on-one with her Heart tutor Alex gave her a newfound enthusiasm for math. When asked how she feels about math after participating in Heart, Emanii said, "I like learning about math and using the cubes!"

On her final assessment, Emanii showed growth in five concept areas—more than doubling Heart's program goal! Emanii also met her target growth goal in math on MAP (Measures of Academic Progress), an adaptive assessment used nationally.

**Name has been changed*



“ I like watching Emanii get more confident with her numbers and seeing her progress. ”

Alex Gajewski, BlackArch, Heart Tutor at Highland Renaissance Elementary

WELLS FARGO

Deepening a Partnership: Wells Fargo and Billingsville Leadership Academy

Wells Fargo was Heart's first corporate donor and has invested over \$100,000 in the past four years to support the program at Billingsville Leadership Academy. Since 2014, Wells Fargo has reached over 250 Billingsville Heart students with math skills and confidence.

Heart is grateful for all Wells Fargo employee volunteers, including Peter Daniel (pictured right), who has volunteered as a Heart tutor for two years and also serves on Heart's Board of Directors as Development Chair. "I serve on Heart's Board because its mission of providing foundational math skills and mentorship to students is impactful, and its reach is rapidly expanding. **I am extremely proud to be a part of Wells Fargo supporting student success through Heart.**"

In 2016/17, **58 Wells Fargo employees volunteered weekly with Heart**, providing high-poverty CMS elementary schools with over **a thousand volunteer hours!** Wells Fargo has featured the partnership with Heart on their 2017 Community Relations Notecards.



Pictured above: Heart tutor and Board member Peter Daniel with one of his Heart students.



Volunteers, students, and families celebrate student progress and learn to play take-home math games at Heart family events, held twice annually at each Heart school site. Pictured above: Billingsville families celebrating in May 2017.



Pictured above: Wells Fargo employee Brittini Robinson with one of her Heart students.

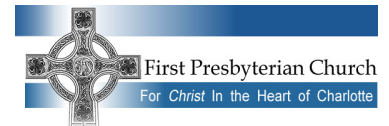
SUPPORTERS OF 2016/17 SCHOOLS

Financial support in FYE 6/30/16 from the donors listed below provided one-on-one tutoring for 643 students

School Sponsors (\$25,000+)



Funding Partners (\$10,000—\$24,999)



- ▶ Charlotte Woman's Club
- ▶ The James Family Foundation
- ▶ William Coltrane & Norma Craft Cannon Charitable Trust

Funding Partners (\$1,500—\$9,999)

- ▶ African American Community Foundation
- ▶ BlackArch Partners
- ▶ Charlotte Hornets Foundation
- ▶ Christ Episcopal Church
- ▶ PNC Foundation
- ▶ PricewaterhouseCoopers LLP
- ▶ TIAA

Donor Spotlight: Brenda Woodcock

"The thorough and convincing data concluding such positive results makes it easy to support the program as a donor. As a tutor, it was so gratifying to get feedback on my individual students from my Program Coordinator soon after their assessments. (I was like a nervous parent wondering how they did!)

As a former educator, I am pleased to see how well this program continues to support and align with teachers' goals without demanding more work from them. I also observed first-hand how well our coordinators knew and tracked each individual student, ensuring no one 'fell through the cracks,' another mark of quality and effectiveness from an educational standpoint."

Brenda Woodcock, fourth year Heart tutor



Thank you to ALL of our supporters for making Heart's work possible!

across 12 schools in the 2016/17 school year. **Thank you to Heart's donors and funding partners!**

2016/17 Student Sponsors (Individuals \$1,000+):

Kathryn and Darren Ash
Addison and Rand Ayer
Mark and Lorri Ayers
Anne and John Barry
Steve and Joanne Beam
Laura and Sam Bowles
Amy and Robert Brinkley
Isabelle and Jim Burbank
Denise and Mike Burkard

John Clay and Cathy Bessant
Sallie and Derick Close
Ashton Colaianni
Nancy and Peter Covington
Peter and Patricia Daniel
Lee Ann and Steve DeCarlo
Minna and Mike Elliott
Marcia and Wesley Eubank
Martha and Eric Eubank

Catherine and Mike Fischer
Meredith and Kelly Graves
Brooke and Dan Hawkins
Jeff and Laura Hay
Vickie and Gene Johnson
Gina and Tom Lawrence
Reid and Anne Leggett
Wandra and George Mackie
Sherry and Mike Mayberry
George and Ann Miles
Russ Morrison

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Lisa and Tom Phillips
Anne and Robert Schleusner
Crystal and Steve Sellers
Daniel Tanaka
LouAnn and Scott Vaughn
Helen and Peter Wallace
Diana Wu and Matt Wang
John and Brenda Woodcock

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Jean Braxton and Gary Andrew
Sarah and Phil Bailey
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Elise and Brian Barksdale
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Gracie and Will Batchelor
Julie and Dudley Bell
Robyn Benjamin
Barbara Bissell and Roy Lindstedt
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Jody and Beth Carpenter
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Andy and Lee Cooney
Murray Corbett
Susan and John Daniel
Emily Daniel Wetsel
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David and Christe Eades
Charlie Elbersen and Lou Kinard
Emily Elliott
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Logan and Jennifer Henderson
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Juli Marley
Margaret and Harrison Marshall
Charles Mattina
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Glenda Mauck
Bill and Dee Dee Maxwell
Abby and Kevin McClure
James McDonald
Sally and Tom McElwee
Ed McMahan
Chrissy Mickler
Luther and Sandra Moore
Rebecca Morris
Jennie Mostellar
Zachary Mulligan

Patti and Pender Murphy
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Emerald Nguyen
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Keith and Lucy Trent
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Linda and Phil Vanderbosch
Todd and Melissa Walker
Mary Claire and Dan Wall
King Yeh and Shianchih Wang
Lucinda Wang
Lisa and Dean Warren
Alec and Mayleng Watson
Ward and Laura Wellman
Christianna and Matt Williams
Katherine and Davis Willingham
Suzanne Wittebort
Cynthia and Kenny Young



THE YEAR AHEAD

Financial support in FYE 6/30/17 from generous supporters will provide one-on-one tutoring for **850+ students**

LEAD FUNDERS (\$100,000+)



SKEEBO
FOUNDATION

SCHOOL SPONSORS (\$30,000—\$99,999)



FAISON
ENTERPRISES

FUNDING PARTNERS (\$10,000—\$29,999)



- ▶ Alpha and Omega Foundation
- ▶ Charlotte Woman's Club
- ▶ The Dickson Foundation
- ▶ The James Family Foundation
- ▶ The Merancas Foundation
- ▶ Philip L Van Every Foundation
- ▶ William Coltrane & Norma Craft Cannon Charitable Trust

FUNDING PARTNERS (\$250—\$9,999)

- ▶ Anonymous
- ▶ BlackArch Partners
- ▶ Caldwell Memorial Presbyterian Church
- ▶ Charlotte Knights Charities
- ▶ Christ Episcopal Church
- ▶ Park Road Baptist Church
- ▶ Selwyn Avenue Presbyterian Church
- ▶ Women's Impact Fund

2017/18 Student Sponsors (Individuals \$1,000+):

Amanda and Bob Anders
Addison and Rand Ayer
Mark and Lorri Ayers
Anne and John Barry
Steve and Joanne Beam
Laura and Sam Bowles
Amy and Robert Brinkley
Tom Bunn
Denise and Mike Burkard
Connie and Peter Carlson
John Clay and Cathy Bessant
Nancy and Peter Covington
Peter and Patricia Daniel

Lee Ann and Steve DeCarlo
Nancy and Bruce Downing
Minna and Mike Elliott
Marcia and Wesley Eubank
Martha and Eric Eubank
Lane and Liz Faison
Catherine and Mike Fischer
Laura and Mike Grace
Meredith and Kelly Graves
Michael Greksa
Patty and Grif Griffin
Vickie and Gene Johnson
Peter Keane

Samantha Kelen
Gina and Tom Lawrence
Christopher Lee
Reid and Anne Leggett
Erin and Rob Lentz
Sarah Lozier
Wandra and George Mackie
Sherry and Mike Mayberry
Leslie Murphy
Kelly Katterhagen and Larry Nabatoff
Anna and Tom Nelson
Lisa and Tom Phillips
Debbie and Pat Phillips
Meredith and Geordie Pierson
Walker and Anne Poole

Rory Riley and Richard Topping
Epes and Anne Robinson
Adam and Emily Schauer
Anne and Robert Schleusner
Wendy and Jason Schmidly
Don Sherrill
Ron and Paulette Sherrill
Theresa and Daniel Sinclair
Jenny and Scott Stevens
Curtis and Rocky Trenkelbach
Linda and Phil Vanderbosch
LouAnn and Scott Vaughn
Helen and Peter Wallace
John and Brenda Woodcock

A two-year project to build a student information system in support of program scale is funded by Apparo's Mission Possible Economic Opportunity Award and The Longleaf Fund.



THE LONGLEAF FUND

DEEP ROOTS. STRONG BRANCHES.

A full list of supporters is available at hearttutoring.org/community-partners. Thank you to ALL of our supporters!

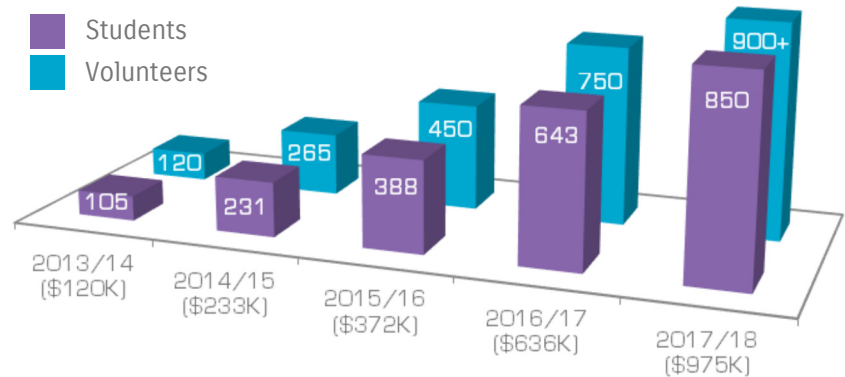
across 17 schools in the 2017/18 school year. Thank you to Heart's donors and funding partners!

School Partners

- ▶ Barringer*
- ▶ Billingsville
- ▶ First Ward*
- ▶ Greenway Park
- ▶ Highland Renaissance
- ▶ Lebanon Road*
- ▶ Merry Oaks
- ▶ Montclair
- ▶ Nathaniel Alexander
- ▶ Piney Grove
- ▶ Sedgefield
- ▶ Shamrock*
- ▶ Smithfield*
- ▶ Sterling*
- ▶ University Meadows
- ▶ Westerly Hills
- ▶ Whitewater*

*New Heart site in 2017/18

Thank you for supporting 850+ students
this school year!



Financial Model

At scale, \$50,000 fully funds a school site, where 50–80 students receive one-on-one instruction for 30 minutes twice weekly from September–May.

Item:	Per School Cost:
Site-based Costs	\$25,000
Program Coordinator	Part-time employee, on-site support
Tutoring Materials	Curriculum, supplies, family events
All Additional Costs at Scale	\$25,000
Program Management	On-site support, CMS relations
Volunteer Recruitment/Support	Partnerships, recruitment
Program Development, Evaluation	Evaluation, curriculum development
Administrative, General, Fundraising	Rent, occupancy, HR
Total Cost per School	\$50,000

The value of instructional time ranges from \$75K–\$115K depending on enrollment, meaning that gifts to Heart are leveraged at almost twice their amount.

“ With this program, I have seen a new light in my students. They are excited to work with their tutors! They come back eager to tell me what they learned and how successful they are. They feel confident and it shows in math class as well. This program has been a blessing for my students! ”

Bridget Joyce, Teacher
Nathaniel Alexander Elementary

FY17 Investment Highlights



Heart Executive Director Emily Elliott at Apparo's ConnectivIT Ball, presented by Microsoft.

The Leon Levine Foundation awarded a \$350K three-year grant to Heart in March 2017, designated for capacity-building investments to support program quality throughout growth. The Leon Levine Foundation has invested in Heart's work since 2014.

In May 2017, Heart was the recipient of Apparo's first Mission Possible Economic Opportunity Award, a \$60K cash and pro bono contribution sponsored by Accenture.

Skeebo Foundation designated early math as one of its key focus areas and helped Heart reach seventeen schools with a \$147K grant in summer 2017.

We would not have been considered for this support without significant community investment. Thank you for donating, volunteering, and advocating for Heart students!

THANK YOU FOR SUPPORTING HEART!

Leadership

Heart Math Tutoring became an independent, 501c3 nonprofit in July 2014 following several years of successful piloting, built from a partnership between Social Venture Partners (SVP), Charlotte-Mecklenburg Schools (CMS), and Communities In Schools (CIS).

Heart Board of Directors

Steve Beam

Community Volunteer

Barbara Bissell

NC Dept of Public Instruction (retired)

Sam Bowles

Minturn Partners

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Community Volunteer

Carla Hermida Clements, *Secretary*

Community Volunteer

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Wells Fargo Securities

Eric Eubank, *Board Chair*

Pamlico Capital

Anne Leggett

Community Volunteer

Erin Lentz, *Finance Chair*

Grant Thornton

Brian Schultz

Charlotte-Mecklenburg Schools

Support Volunteer Recruitment!

More than **900 community members** are weekly tutors with Heart this year, working one-on-one to help students build a strong foundation in math and enthusiasm for academics.

Tutors are still needed! Sign up at hearttutoring.org/volunteers/become-a-volunteer

Key Volunteer Partners in 2017/18*



103 tutors



91 tutors



57 tutors



50 tutors



41 tutors



38 tutors



22 tutors

Teach For America Alumni & Staff (18), Barings (17), Myers Park Presbyterian Church (15), K&L Gates (13), PricewaterhouseCoopers (12), Global Endowment Management (11), Duke Energy (8), Grant Thornton (8), BlackArch Partners (7), Christ Central (7), Matthews United Methodist (7), US Bank (7), and many others.

*Current as of October 2017

You can join Heart's recruitment efforts by sharing information about volunteering with Heart Tutoring with friends and colleagues or setting up a presentation with your civic group or business! Contact volunteer@hearttutoring.org for more information.

Thank you to the following organizations for hosting Heart Math Tutoring for presentations and volunteer recruitment events:

Accenture Charlotte, Amec Foster Wheeler, Bank of America, Barings, BEJS, Charlotte Knights Charities, Charlotte Mecklenburg Black Chamber of Commerce, Davidson College, Duke Energy, Global Endowment Management, Grant Thornton, JLL, K&L Gates, Matthews United Methodist, Metropolitan Business and Professional Women, National Society of Black Engineers, Pamlico Capital, Patterson Pope, Pritchard Memorial Baptist, Selwyn Presbyterian, SouthPark Rotary, St. Stephen United Methodist, Social Venture Partners Charlotte, Teach For America, Temple Beth El, TIAA, U.S. Bank, University City Connect, Wake Forest University, Watershed Church, Wells Fargo

