



Connecting Students & Volunteers
for Results that Count

2018 ANNUAL REPORT





Thank you to everyone who works with the program! We appreciate your help and support. Please know that you make a difference in a child's life.



Pamelyn DeBerardinis, First Grade Teacher at Westerly Hills Academy



2018 ANNUAL REPORT

September 2018

Dear Heart Donors and Financial Partners,

Thank you! You gave nearly 900 students one-on-one tutoring in the 2017/18 school year. The personal attention, math skills, and encouragement changed their experience of school last year, and you've broadened their knowledge and life options going forward.

In this 2018 Annual Report, we are excited to share the impact of your investment.

- ▶ Students: *Almost every single student* showed measurable and meaningful gains in their math skills. 98% met growth goals on pre- and post- assessments, explained further on the next page.
- ▶ Leverage: Your giving unlocked 17,000+ hours of one-on-one attention for students from over 980 dedicated volunteers this past year. Donations supply a Program Coordinator and structured curriculum at each school site so that volunteer tutors are supported and effective.
- ▶ Partners, Leadership, Finances: Read more about the board, donors, and partners behind the work.

You'll also see an update on 2018/19 tutor recruitment. Our 17 school partners have now grown to 22, requiring weekly tutors for 1,100 Heart students.

From Dahleesia Johnson, third grade teacher at Sterling Elementary, *"I want you know that what you are doing matters. Every dollar you are donating matters. Every thirty minute session matters."* Recent videos with reflections from Ms. Johnson and Principal Dr. Emily Miles are available at bit.ly/DJHMT and bit.ly/EMHMT.

In their words and ours, we thank you for making this program possible in the schools!

With gratitude,



Emily Elliott
Executive Director, Heart Math Tutoring
980-292-2297, eelliott@hearttutoring.org

Thank you for supporting the mission to ensure all elementary students build the strong foundation in math and enthusiasm for academics needed for long-term success, by helping schools use volunteers as tutors.

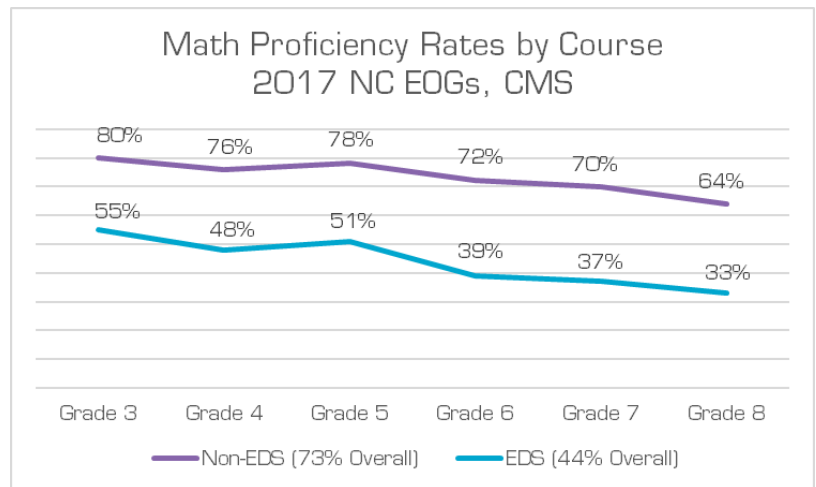
YOUR IMPACT ON STUDENTS

The Need for Math Proficiency

Math achievement at age 7 is predictive of socioeconomic status at 42, even after controlling for IQ, academic motivation, and socioeconomic status at birth.¹

Only 44% of economically-disadvantaged students (EDS) in CMS performed on grade level in math on 2017 NC End of Grade tests (EOGs). Without foundational math skills, scores decline as difficulty increases, leaving students unprepared for Math I (algebra), a high school graduation requirement (right).

Teachers have limited capacity to provide the targeted attention needed to help students catch up to grade level, especially in high-poverty schools. In response, Heart recruits and supports tutors in **the only volunteer-delivered math intervention** used during the school day in CMS.



Leading on Opportunity

Charlotte recently ranked 50 out of 50 in a study of economic mobility, with public-school quality, segregation, and social capital named as factors². In 2017, the Charlotte-Mecklenburg Opportunity Taskforce released the Leading on Opportunity Report in response. "...We need to address the reality that children and youth who grow up in low-opportunity neighborhoods or attend high-poverty schools often find they are playing on an uneven field compared to those who grow up in higher-opportunity areas. **Many do not have relationships, role models, and experiences that help them see possibilities for their lives outside their current circumstances.**"

Heart connects children attending high-poverty schools with volunteers from Charlotte business, faith, and civic groups. Weekly volunteers work one-on-one with students, and with ~90% of volunteers finishing the full year, Heart tutors offer students the dependable presence of a mentor. Civic engagement for tutors also increases: tutors report increased likelihood of advocating for increased funding for public schools (61%) and voting in local government elections (48%).



“The impact volunteers have on my students is not only academic but also social emotional and helps them feel like they have someone else on their "team" supporting them.”

Amanda Saunders

Fourth Grade Teacher at Billingsville Leadership Academy

1. Ritchie & Bates, *Enduring Links From Childhood Mathematics and Reading Achievement to Adult Socioeconomic Status*, 2013
2. Chetty et al., *Where is the Land of Opportunity? The Geography of Intergenerational Mobility in the United States*, 2014

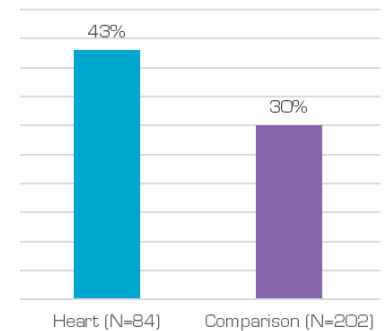
Improved Foundation in Math

In September, Heart uses **research-based assessments** to diagnose student needs across 12 foundational math skills. Post-assessments in May measure program efficacy.

98% of 2017/18 Heart students met program growth goals in math, set with guidance from elementary math specialists at UNC Charlotte and CMS.

In 2017, UNC Charlotte Urban Institute conducted a matched comparison analysis finding Heart students grew more than comparison students on MAP and NC EOG tests (right).

% Students Improving on Math EOG Achievement Level, 2015 to 2016



Improved Enthusiasm for Academics

89% of teachers reported an increase in student confidence or enthusiasm toward math because of Heart's program.

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



“Carl did not see himself as successful in anything...”



Carl* began third grade needing help figuring out the difference between two numbers (“More or Less,” a first grade standard). Heart paired Carl with two tutors who each tutored him once a week, giving him the opportunity to work on math at his level in fun and engaging ways.

By the end of the year, Carl had not only mastered More or Less – he had grown in seven concept areas. He also scored a 4 on his math EOG – college and career ready!

“When the tutors at my school get to the door, the faces of my students light up... **Carl did not see himself as successful in anything, and because of the work you have all been doing, he now sees himself as a scholar.**”

I want you know that what you are doing matters. Every dollar you are donating matters. Every thirty minute session matters.”

Ms. Dahleesia Johnson, Carl's teacher at Sterling Elementary

**Name has been changed*

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.

2017/18 PROGRAM RECAP

Thanks to support from generous donors and volunteers, more than **980 tutors** worked one-on-one with **893 elementary students** across 17 high-poverty schools in 2017/18. Thank you for helping more students build a **strong foundation in math and enthusiasm for academics!**

School Partners

Students in grades 1-5 at 17 partner schools received tutoring for 30 minutes, twice per week, from September to May.

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

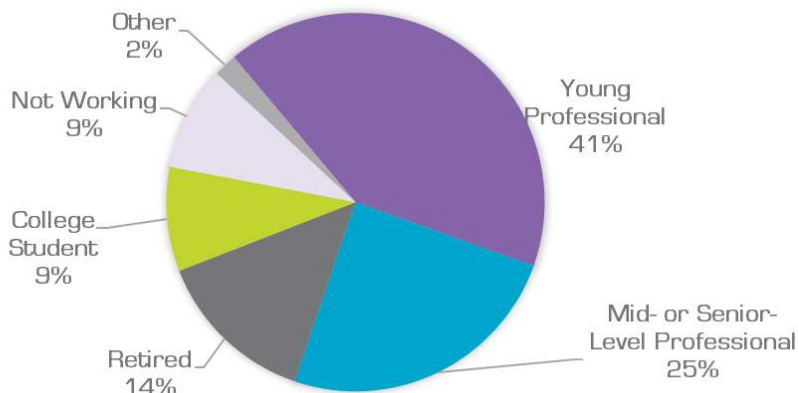


Volunteers

100%

of volunteers in 2017/18 rated their experience with Heart as positive, and 98% would recommend tutoring with Heart to a friend (599 survey responses).

980 Weekly Tutors



“ I have witnessed firsthand the impact the curriculum has on my students’ understanding of math, in addition to their overall confidence with numbers and learning new things. It is the most efficient use of volunteer’s time I have ever experienced! ”

2017/18 Volunteer Tutor at Lebanon Road Elementary

Volunteer Partners in 2017/18



130+ tutors



98 tutors



60 tutors



57 tutors



42 tutors



38 tutors



24 tutors



22 tutors



22 tutors

Barings (18), Elevation Church (18), Teach For America (18), Global Endowment Management (14), K&L Gates (14), PricewaterhouseCoopers (14), Christ Episcopal Church (12), Matthews United Methodist (12), UNC Chapel Hill Alumni (12), Watershed Charlotte (11), Myers Park United Methodist Church (10), Blair Road United Methodist Church (10), Christ Central (9), Covenant Presbyterian (8), Davidson Alumni (8), Clemson Alumni (7), Duke Energy (7), Forest Hill Church (7), Junior League of Charlotte (7), Moore & Van Allen (7), Pamlico Capital (7), Red Ventures (7), Synchrony Financial (7), US Bank (7), Fifth Third Bank (6), Grant Thornton (6), St. John's Baptist Church (6), UNCC Alumni (6), Accenture (5), BlackArch Partners (5), Central Piedmont Community College (5), Church at Charlotte (5), CMPD (5), Cottingham Chalk (5), McGuireWoods (5), Selwyn Presbyterian Church (5), South Park Rotary (5), St. Andrews United Methodist Church (5), Uplift Christian Ministries (5), UTC Aerospace (5), and others.



Deepening a Partnership: TIAA Serves



The partnership between TIAA and Heart Math Tutoring began in the 2014/15 school year with two TIAA employees volunteering each week as tutors. By 2017/18, TIAA employee volunteer tutors had grown to 42 weekly tutors, providing CMS with 660 hours of targeted instruction!



For this upcoming school year, TIAA has provided a generous donation which will support some of the cost of an on-site Heart Program Coordinator, tutoring supplies, and two family engagement events at one school site.

"We appreciate the critical contribution that Heart Math Tutoring provides to the community. TIAA was created to serve, and we are proud of the TIAA Serves employees who volunteer with Heart and the impact they have on CMS students every week!" - Jarian Kerekes, Senior Director of Corporate Social Responsibility at TIAA

Top left: TIAA employees after assembling hundreds of take-home math games. Heart hosts two annual family engagement events at each school site where families meet volunteers, receive take-home games, and learn ways to practice math at home. Bottom left: TIAA employee Baneshia Wyatt celebrating her student's success with her student's family at a 2018 family engagement event.

SUPPORTERS OF 2017/18 SCHOOLS

Financial support in FYE 6/30/17 from the donors listed below provided one-on-one tutoring for 893 students

Lead Funders (\$100K+)



School Sponsors (\$30K+)



Funding Partners (\$10K+)



William C. and Norma C. Cannon Charitable Trust

Funding Partners (\$250+)

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

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.



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

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

Class Sponsors (\$5K+)

Amy and Robert Brinkley	Minna and Mike Elliott	Vickie and Gene Johnson	Don Sherrill
Tom Bunn	Martha and Eric Eubank	Reid and Anne Leggett	
Lee Ann and Steve DeCarlo	Liz and Lane Faison	Wandra and George Mackie	

Student Sponsors (\$1K+)

Amanda and Bob Anders	Nancy and Bruce Downing	Sarah Lozier	Adam and Emily Schauer
Addison and Rand Ayer	Marcia and Wesley Eubank	Sherry and Mike Mayberry	Anne and Robert Schleusner
Anonymous	Catherine and Mike Fischer	Leslie Murphy	Wendy and Jason Schmidly
Mark and Lorri Ayers	Laura and Mike Grace	Kelly Katterhagen and Larry	Ron and Paulette Sherrill
Anne and John Barry	Meredith and Kelly Graves	Nabatoff	Theresa and Daniel Sinclair
Steve and Joanne Beam	Michael Greksa	Anna and Tom Nelson	Jenny and Scott Stevens
Laura and Sam Bowles	Patty and Jim Griffin	Lisa and Tom Phillips	Curtis and Rocky Trenkelbach
Denise and Mike Burkard	Peter Keane	Debbie and Pat Phillips	Linda and Phil Vanderbosch
Connie and Peter Carlson	Samantha Kelen	Meredith and Geordie Pierson	LouAnn and Scott Vaughn
John Clay and Cathy Bessant	Gina and Tom Lawrence	Walker and Anne Poole	Helen and Peter Wallace
Nancy and Peter Covington	Christopher Lee	Rory Riley and Richard Topping	John and Brenda Woodcock
Peter and Patricia Daniel	Erin and Rob Lentz	Epes and Anne Robinson	

Individual Donors (<\$1K)

Jeff and Mary Abbood	Carla and Matt Clements	Joan Herbert	George and Ann Miles	Crystal and Steve Sellers
Kelley Anderson	Jean and Gene Cochrane	Andre Hester	Janet Miller	Ginny Shaw
Eric Andreozzi	Lisa and Peter Colaianni	Ben and Kathy Hill	Valerie and Robert Mittl	Lisa and Glenn Sherrill
Jean Braxton and Gary Andrew	Daniel and Bonnie Collins	Amy Hockett and Eric Rohm	Luther and Sandra Moore	Sarah and Allen Shifflet
Anonymous (3)	Janis and Hunter Cook	Lynn and Charles Hodges	DeAnn and Jeff Moser	Susan and John Shimp
Charlotte and Chris Atkinson	Jim and Allene Cooley	Deborah and John Hofland	Jennie Mostellar	Dana Shope
Sarah and Phil Bailey	Andy and Lee Cooney	Cornelia and Rod Hoover	Zachary Mulligan	Beth Silverstein
John and Gloria Barbe	David Cox	Kathy and Steve Horvath	Brandon Neal	Amy Sinclair
Elise and Brian Barksdale	Emily Daniel Wetsel	Jim Hynes	Anne and Clark Neilson	Susan and John Siphers
Aaron Barnes	George Dewey	David Jessup	Shannon Newell	Sarah Slattery
Pam and Ernest Barry	Mary Anne Dickson	David Johnson	David Nguyen	Anya Slepyan
Larry and Marti Bartelt	Vivian Dorsel	Larsen Jones	Brian Nwokedi	Kathleen Smith
Gracie and Will Batchelor	Thomas Duncan and Sheila	Tom and Dana Joseph	Emily Odioso	Susan Speckman
Mary and Walt Beaver	Shaffer	Wendelyn Kelly	Dave and Sue Ogden	Lee Stafford
Pam and Jay Belk	David and Christe Eades	Debbie and Michael Kemmy	Alyson Osef	Eric Strack
Robyn Benjamin	Emily Elliott	Gerry Kingsley	Caryn and Warren Overbey	Patrick Sullivan
Donald and Barbara Bernstein	Ms. Judy Emken	Trent and Kimberly Kirk	Stephanie and Billy Owens	Chuck and Linda Talmadge
Robert and Sally Billington	Tere and Doug Ey	Ed and Page Kizer	Deborah and Mike Parman	Claire and John Tate
Barbara Bissell and Roy Lindstedt	Diana and Cam Faison	Christ and Marjorie Koconis	Andrew Parrish	Ann and Tom Temple
Betsy and Mike Blair	Leigh and John Finley	Matthew Kozlowski	Anne Patefield	Jeff and Leigh Ann Thomas
Bill and Betsy Blue	Scott and Alyson Fischer	Patricia Kunder	Beejal Patel	Ann Timberlake
Kim and Eddie Booher	Anne and Hank Flint	Jeanne Kutrow	Nancy Peebles	Brian and Christine Tolleson
Elizabeth Boonsue	David Fold	Kelli and Pete Lash	Randy and Emily Phillips	Blair and Buch Tomlinson
Crandall and Erskine Bowles	Rosalyn Frazier	Lucille Liaw	James Pickard	Mac and Debi Tornow
Annie Bowles and Eric Wilkins	Eleanor and Will Funderburg	Kathryn and Kevin Lilly	Brad and Jenna Poole	Sam Towne
Cathy and Lee Bradley	Melissa and Jeff Gass	Joy Lin	Lynn and Frank Potocnik	Keith and Lucy Trent
Sage and Dale Brook	Catharine and Larry Good	Julie and Petri Lindberg	Woods and Rich Potts	Ashley and Joel Turner
Renee and Todd Broud	Jason and Aimee Greeter	Susan Linderman	Deborah Proffitt	Jo Van Dyke
Joan and Charles Brown	Alexandra Gregory	John J. Locke	Margaret and Rusty Rainey	Connor Van Dyke
Tony Brown	Molly and Robert Griffin	Mary Louise Lowe	Sherri and Hank Ralston	Carla Vitez
Betsy Brunnermer	Bill and Elaine Griffin	Lisa Ludwig	Ken and Lucy Raynor	Todd and Melissa Walker
Michelle and Todd Buelow	Jack Grote	Janet and Rich Lyman	Judy Rice	Mary Claire and Dan Wall
Ann Bui	Travis and Lise Hain	Stacy and Steve Lynch	Heidi and Tim Risser	Sue Walsh
Elise Cader	Jim Halka	Jena Manilla	Carol and Martin Robinson	Charles Watson
Ed and Debbie Calcote	Liz and Chris Hamilton	Juli Marley	Sally and Russell Robinson	Raymond Weidler
Dr. and Mrs. Calcote	Ashly Hamilton	Mary Anna and Brian Marley	Sandy Roether	Ward and Laura Wellman
Mark and Katie Caldwell	Carol and Watts Hamrick	Margaret and Harrison Marshall	Dave Rogers	Katherine and Davis Willingham
Bowen and Lucy Caldwell	Sarah Handler	Charles Mattina	George and Brenda Rohe	Colleen Willis
Blair Campbell	Ben Harrigan	Glenda Mauck	Carla and Ed Rose	Al and Susan Winget
Jody and Beth Carpenter	Donny and Tricia Harrison	Bill and Dee Dee Maxwell	Melissa and Keith Rossi	Andrew Yavorski
Marti and Thomas Cato	George and Terri Hart	Caroline and Palmer McArthur	Richard and Eula Rush	
Howard Chen	Jeff and Laura Hay	Marsha and Phil McCrory	Liz and Bill Schillings	
Carol and Milt Childress	Logan and Jennifer Henderson	Bob McElfresh	Brian and Vicki Schultz	
Kathryn V. Clancy	Helen and Desmond Herbert	Chrissy Mickler	Sarah Schweppe	

GOVERNANCE AND FINANCE

Governance

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

Heart Board of Directors

Steve Beam
Merrill Lynch (retired)

Barbara Bissell
NC Dept of Public Instruction (retired)

Sam Bowles
Threadridge Investment Partners

Connie Carlson, Governance Chair
Community Volunteer

Peter Daniel, Development Chair
Wells Fargo Securities

Eric Eubank, Board Chair
Pamlico Capital

Michael Hutson
K&L Gates

Dominique Harris Johnson
Duke Energy Foundation

Anne Leggett
Community Volunteer

Erin Lentz, Finance Chair
Grant Thornton

Finance

This past school year, 46 individual donors each sponsored a student with weekly tutoring (\$1,000), and 10 donors sponsored a class with tutoring (\$5,000+)! In addition to funding 22% of Heart's total budget, individual supporters have also made an impact on Heart students by advocating for corporate/foundation funding. **Thank you** for your generosity to Charlotte students!

Heart Math Tutoring Expenses 2017/18 School Year	
Expenses	
Program	
Compensation	\$575,045
Tutoring curriculum/materials	\$44,096
Other program costs	\$25,295
Program Total	\$644,436
Development/Admin	
Compensation	\$178,245
Facilities/Equipment	\$31,511
Business expenses, software, et	\$17,756
Materials/Office supplies	\$16,098
Development/Admin Total	\$243,610
Total Expenses	\$888,046
Cost per school	\$52,238

Heart Math Tutoring Cost Per School, 2017/18		
Item:	Per School Cost:	
Site-based Costs	\$21,283	
Program Coordinator (PC) ¹	18-20 hr/wk, on-site support for tutors/students	
Tutoring Materials and Supplies	Curriculum, tutoring materials, family events	
Shared Costs	\$30,955	
Volunteer Recruitment/Support	Partnerships, targeted recruitment	
Program Development/Evaluation	Data analysis, curriculum development, etc	
Program Management	On-site in schools, PC training, CMS relations	
Administrative, Fundraising	Rent, occupancy, HR, development	
Approximate Cost per School	\$52,238	50 - 80 students receive 1:1 instruction 2x/wk
Value of instructional hours	\$84,000	60 hours per week, \$50/hour, 7.5 months ²
Value/Cost	1.6x	
¹ Hourly, ten-month employee: Supervises tutoring sessions, Manages ~60 - 90 weekly tutors, Monitors progress of ~50 - 80 students, Reports progress to teachers.		
² Assuming 60 students. Enrollment ranges from 50 - 80. The value of instructional time ranges from \$75K - \$115K depending on enrollment, not including other value the program brings to the school and teachers.		

Note: During the 2017//18 School Year, Heart also invested over \$70,000 in a technology capital project, building a "student database" to support program quality and scale. The project was supported by restricted grants from Apparo (\$10K) and The Longleaf Fund (\$50K).

Financial support in FYE 6/30/18 will provide one-on-one tutoring for 1,100+ students across 22 schools in the 2018/19 school year. Thank you to Heart's donors and funding partners!

Lead Funders (\$100K+)



School Sponsors (\$30K+)



Funding Partners (\$20K+)



THE DICKSON FOUNDATION



Jenny Lillian Semans
Koortbojian Trust

Lucille P. and Edward
C. Giles Foundation



Funding Partners (\$10K+)

C.D. Spangler
Foundation



The James Family
Foundation



The Merancas
Foundation

Philip L. Van Every
Foundation



William C. and
Norma C. Cannon
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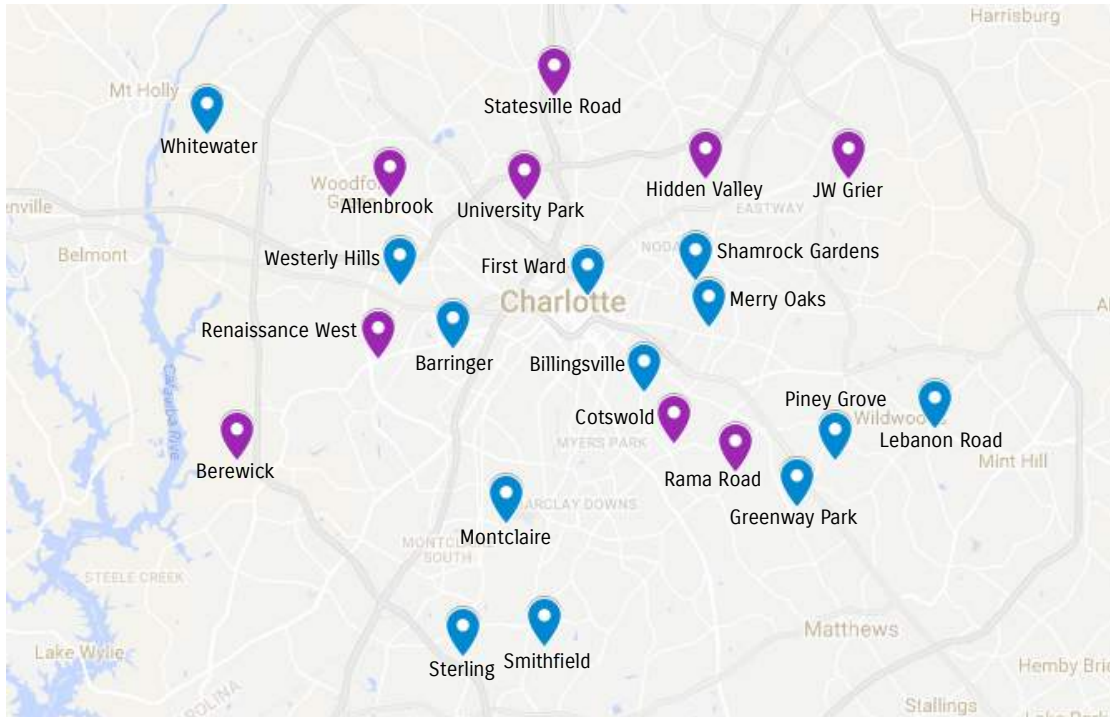
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Martha and Eric Eubank
Heather and Tom Finke
Meredith and Kelly Graves

Vickie and Gene Johnson
Reid and Anne Leggett
Wandra and George Mackie
Don Sherrill

Jake Thompson

School Partners

Heart Math Tutoring is recruiting volunteers to tutor students across 22 school partners (below)! Volunteering with Heart is an easy way to develop a relationship with a student while also helping them build skills and confidence critical for their success. With on-site support and an easy-to-follow game-based curriculum, Heart provides everything you need to make a difference.



 Returning school partners  New school partners

Highlighted School Partners

Allenbrook Elementary

M-Th, 7:45-8:45AM, 12:00-1:00PM

Berewick Elementary

T-F, 8:30-9:30AM; M-Th, 12:30-1:30PM

Hidden Valley Elementary

M-Th, 8:00-9:00AM, 1:00-2:00PM

Joseph W Grier Academy

M-Th, 8:00-9:00AM, 12:30-1:30PM

Renaissance West STEAM

T-F, 8:30-9:30AM; M-Th, 1:30-2:30PM

Statesville Road Elementary

M-Th, 8:05-9:05AM, 1:30-2:30PM

University Park Creative Arts

M-Th, 12:45-1:45PM, 2:00-3:00PM

Whitewater Academy

M-Th, 7:45-8:45AM, 1:00-2:00PM

Get Involved!

You can make a difference by signing up to tutor, sharing information about volunteering with Heart Tutoring with friends and colleagues, or setting up a presentation with your civic group or business! For more info contact volunteer@hearttutoring.org or visit hearttutoring.org/volunteers/become-a-volunteer.

“ You can make a great difference in a student's life by tutoring for just one hour a week. It is a small commitment that has a major impact! ”

2017/18 Volunteer Tutor at First Ward Creative Arts Academy

