

2023 ANNUAL REPORT



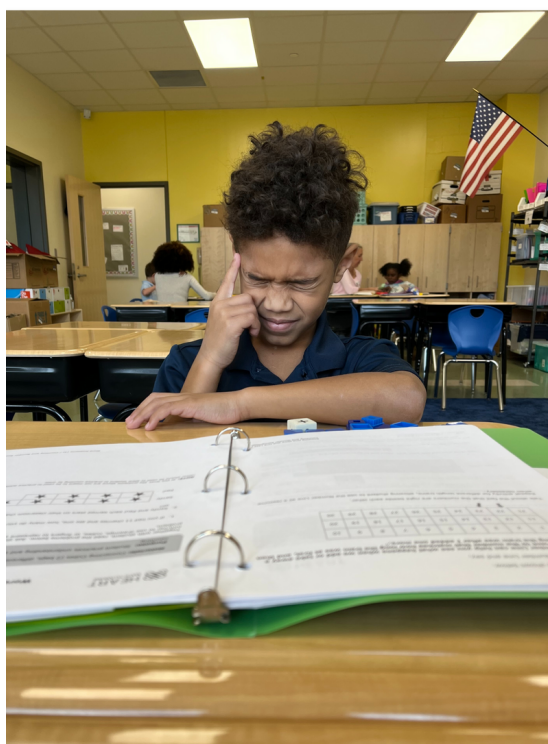
Heart Math Tutoring
PO Box 30623, Charlotte, NC 28230
www.heartmathtutoring.org
704 931 3209

OUR MISSION

To ensure that all elementary students develop the strong foundation in math and enthusiasm for academics needed for long-term success, by helping schools use volunteers as tutors

OUR CORE VALUES

Student-Centered
Gratitude
Growth Mindset
Precision and Professionalism
Civic Engagement



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September 2023

Dear Heart Math Tutoring Donors and Funding Partners,

Last year, your support enabled 1,072 students at 28 elementary schools to receive one-on-one tutoring sessions twice weekly from dedicated volunteer tutors. Heart students gained confidence, strengthened foundational math skills, and built relationships with their tutors throughout the year. 1,287 volunteer tutors provided 19,497 tutoring hours that would not have been available to students otherwise! Most importantly, 96% of students showed growth on pre/post assessments that meets goals set by elementary math specialists, and 92% of teachers reported that their Heart students' academic confidence increased following program participation. Your support is making a tremendous difference!

2023 marks Heart's 10th year as a nonprofit organization. Volunteers from Social Venture Partners, led by Reid Leggett, Catherine Fischer, Martha Eubank, and Minna Elliott, among others, piloted the program beginning in 2010. In December 2013, Heart Math Tutoring became a standalone nonprofit organization. Join me as we look back on 10 years of Heart Math Tutoring on pages 3-4, and please mark your calendar for our 10-year celebration on February 22nd, 2024 (more info to come)!

Heart's partners – students, tutors, donors, staff, and others – have supported growth from two to 26 schools in Charlotte over the past ten years, and I am excited to share several opportunities and new initiatives as we look forward:

- Regional expansion is underway, with three schools in Charleston, SC, and one school in Winston-Salem, NC operating Heart's program in 2023/24. Read more on page 10.
- Heart 3-5, an afterschool program focused on both intervention and grade-level concepts for 3rd-5th graders, is entering its second year at Renaissance West STEAM Academy funded by Charlotte-Mecklenburg Schools' COVID-19 relief funds. Read more on page 5.
- We are partnering with a program evaluator to monitor innovations while preserving the core components of the program that have supported strong student success to date. In 2023/24, we are piloting an increase in the number of weekly tutoring sessions and an extended-day Program Coordinator in a subset of schools. We look forward to reporting back on results.

We are grateful for the opportunity to have connected over 5,000 students with support from dedicated tutors over the past ten years! We look to the next ten years as an opportunity to deepen that support and give many more students successful experiences in math in Charlotte and beyond. Thank you for making it all possible.



With gratitude,

Emily Elliott Gaffney
Chief Executive Officer



10 YEARS AND COUNTING!

In 2010, Heart Math Tutoring was designed and piloted by Social Venture Partners (SVP) with collaboration from Charlotte-Mecklenburg Schools (CMS) and Communities In Schools based on the belief that volunteers can be a powerful resource for high-quality academic intervention when given the right tools and support. After Social Venture Partners' investment of volunteer leadership and nearly \$200,000 to pilot and sustain the program in its initial years, Heart Math Tutoring became an independent 501(c)(3) organization in December 2013. Since then, Heart's dedicated donors, volunteers, and school partners have supported growth from two to 26 Charlotte elementary schools and beyond! Join us as we look back and celebrate 10 years of Heart Math Tutoring!



2013-14

2 SCHOOLS

105 STUDENTS

Heart became a nonprofit in December 2013. SVP Partner Anne Leggett was the Founding Board Chair and Emily Elliott Gaffney was hired as Founding Executive Director. Billingsville and Winterfield Elementary became the first school partners for the new prototype developed in the pilot years - 50 students per school across grades 1-5!

2014-15

5 SCHOOLS

231 STUDENTS

With support from Reemprise Fund, Heart rebranded in 2015 to prepare to gain additional traction in Charlotte. Heart was originally an acronym: Helping Ensure Academic Results through Tutoring. The acronym was dropped and the logo we know and love today was born!



2015-16

8 SCHOOLS

388 STUDENTS

Our first full-time Program Manager was hired in 2015 to oversee 8 schools. We began to scale the Program Manager model that we use today, where Program Managers oversee ~6 school sites and Program Coordinators provide on-site support at each school.

2016-17

12 SCHOOLS

643 STUDENTS

An exciting \$350K three-year capacity building grant from The Leon Levine Foundation in spring 2017 allowed Heart to make early investments in key management staff and supported the transition to a partial fee-for-service model, critical to enabling growth with quality and long-term sustainability.

2017-18

17 SCHOOLS

893 STUDENTS

With generous support from The Longleaf Fund, Skeebo Foundation, Apparo, and Accenture, Heart staff and partners completed a 450+ hour build of a highly customized student database in Salesforce. The resulting infrastructure was essential for ensuring data visibility across an increasing number of schools as well as accelerating student outcomes.

2018-19

22 SCHOOLS

995 STUDENTS

In 2018, Heart was awarded a transformational, \$1.25M, 5-year grant from Albemarle Foundation and Bank of America Charitable Foundation in support of economic mobility efforts - our largest commitment to date.



2019-20

23 SCHOOLS

1,193 STUDENTS

When the pandemic caused school closures in March 2020, donor support enabled creation of the "Heart at Home" program with web-based math resources. Staff created and piloted a successful virtual program during summer 2020 to be ready for the possibility of an entirely virtual delivery the next year.

2020-21

19 VIRTUAL SCHOOLS

516 STUDENTS

Leaning into our growth mindset core value, staff and volunteers continued iterating on the virtual model while school facilities were closed, adapting HMT's curriculum for virtual delivery and training over 1,000 tutors. We learned that tutoring early math concepts over a computer screen works!

2021-22

25 SCHOOLS

973 STUDENTS

Students and tutors returned to in-person tutoring at many locations. The virtual format was updated to work onsite at schools and maintained as a tool to reach even more students. Expansion to Charleston, South Carolina began, with a successful pilot program at Ladson Elementary from January to April 2022!

2022-23

28 SCHOOLS

1,072 STUDENTS

One of the only elementary math interventions operating at scale, Heart was accepted to the learning cohort of Accelerate to engage with providers across the nation and evaluate tutoring best practices. Additionally, funded through COVID-19 relief funds from CMS, Heart 3-5 began at Renaissance West STEAM Academy (read more on page 5).

2023-24

31 SCHOOLS

1,400+ STUDENTS

Our team has continued to grow and we moved to a new office. Heart's second regional expansion location, Winston-Salem, began programming!



2022/23 STUDENT RESULTS

Heart Math Tutoring exists to give young students successful experiences in math through one-on-one tutoring during the school day delivered by supervised volunteers. HMT provides assessments, individualized curriculum, and an on-site Program Coordinator to minimize day-to-day work for school staff.

In 2022/23, support from donors and funding partners provided one-on-one tutoring twice weekly for 1,011 elementary students across 26 Charlotte-area schools, thanks to help from 1,241 volunteer tutors! Programming included 18 in-person school sites and 8 school sites that delivered HMT's virtual model.

HEART 3-5

Funded entirely through a new initiative from Charlotte-Mecklenburg Schools COVID-19 relief funds, the Heart 3-5 program served approximately 50 students at Renaissance West STEAM Academy in 2022/23. Heart 3-5 utilizes trained, paid tutors to provide small group instruction after school for students 3 hours per week for 27 weeks. This program is different from yet complementary to Heart's core model, creating a pipeline of support from foundational skills to Grades 3-5 Math standards to better ensure students are prepared for middle school!



96%

of all Charlotte students demonstrated growth on pre/post assessments that meets goals set by elementary math specialists.

92%

of Charlotte teachers believe their Heart students showed increased confidence/enthusiasm in math as a result of program participation.

"My students who participated in HMT loved their tutors and showed great growth in foundational skills. The support you provided without adding to the load of the teacher's responsibility was greatly appreciated."

-Anna Hinton, 1st Grade Teacher at Montclair Elementary



98

Net Promoter Score from Charlotte families

"I saw a difference! It made my child more confident to the point he wanted to do his math homework!"

-Parent of a 2022/23 Heart student at Blythe Elementary

"[HMT] has boosted my daughter's confidence in math. She truly loves math now and says it was always the highlight of her week meeting with her tutor."

-Parent of a 2022/23 Heart student at Elizabeth Traditional Elementary

2022/23 CHARLOTTE SCHOOL PARTNERS

Billingsville Elementary
 Blythe Elementary
 Bruns Avenue Elementary
 Charles Parker Academic Center*
 Cotswold Elementary*
 Devonshire Elementary*
 Elizabeth Traditional Elementary
 Endhaven Elementary
 Hidden Valley Elementary*
 Highland Renaissance Academy*
 Huntingtowne Farms Elementary
 Joseph W. Grier Academy
 KIPP Change Academy*
 Lansdowne Elementary
 Merry Oaks International Academy
 Montclair Elementary
 Myers Park Traditional School
 Oakhurst STEAM Academy
 Pineville Elementary
 Rama Road Elementary
 Shamrock Gardens Elementary
 Smithfield Elementary
 Starmount Academy of Excellence
 Statesville Road Elementary*
 Sterling Elementary*
 Westerly Hills Academy

*Virtual tutoring site

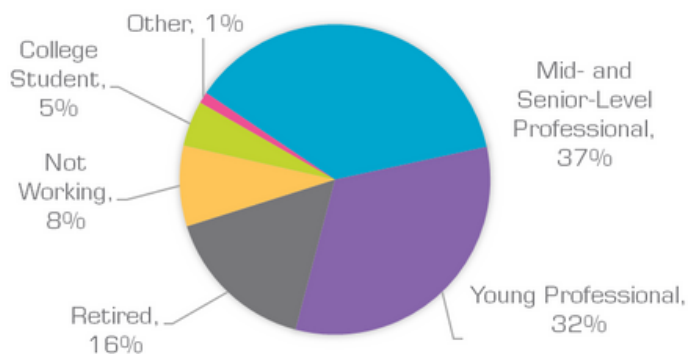


2022/23 VOLUNTEER IMPACT

Heart was originally piloted by volunteers from Social Venture Partners, and volunteers remain the “heart” of Heart Math Tutoring! We are grateful for the 1,241 Charlotte volunteers who committed time each week to deliver individualized tutoring and build relationships with students in 2022/23.

Heart Math Tutoring provides training, volunteer-friendly lesson plans, and real-time support from a Program Coordinator. Tutoring or teaching experience is not required to participate! Learn more and consider becoming a volunteer tutor by visiting www.heartmathtutoring.org/volunteer.

1,241 VOLUNTEER TUTORS



KEY VOLUNTEER PARTNERS*

BANK OF AMERICA

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

WAKE FOREST
UNIVERSITY

TIAA

Brighthouse
FINANCIAL

EY

First Presbyterian
Church of Charlotte
FOR CHRIST IN THE HEART OF CHARLOTTE

Christ Church Charlotte
CHRIST EPISCOPAL CHURCH

WELLS
FARGO

*25+ tutors in 2022/23

1,241

individuals dedicated at least 30 minutes each week as volunteer tutors in Charlotte.

18,652

hours were spent delivering 1:1 math support to Charlotte students.

98%

of Charlotte volunteers rated their experience as positive.

98%

of Charlotte volunteers said they saw improvement in their students' math skills.



"The kids LOVE Heart! The tutors are kind and build relationships with the kids, which really helps them learn. Their math skills have increased this year!"

-Claire Young, 1st Grade Teacher at Blythe Elementary

"My son really improved, his tutor clicked with him, and I can tell she cares a lot about my son and his success. She is incredible!"

-Parent of a 2022/23 Heart student, Billingsville Elementary

"[HMT] is a small but mighty way to make an impact in the community and in young children's lives."

-2022/23 Volunteer Tutor



"IT'S NOT COMPLICATED!"

A math major and former insurance quant, Mike Dorsel is a math enthusiast who has tutored over 50 students in his past eight years volunteering with Heart!

Mike spends multiple hours per week at Heart school sites and loves seeing his students' understanding deepen.

"They've gained a familiarity; they've gained a math maturity. No matter whether they go back to some of the standard methods or not, they've got a toolbox that's going to help them, they've got an understanding, and that's the neat stuff," said Mike.

The time Mike spends tutoring each week has a personal impact as well. "I feel like when I engage in Heart, the rest of the world goes away and I have something that I can look forward to a couple times a week; have a space where I'm interacting with somebody that wants to have fun and learn. It's not complicated!"

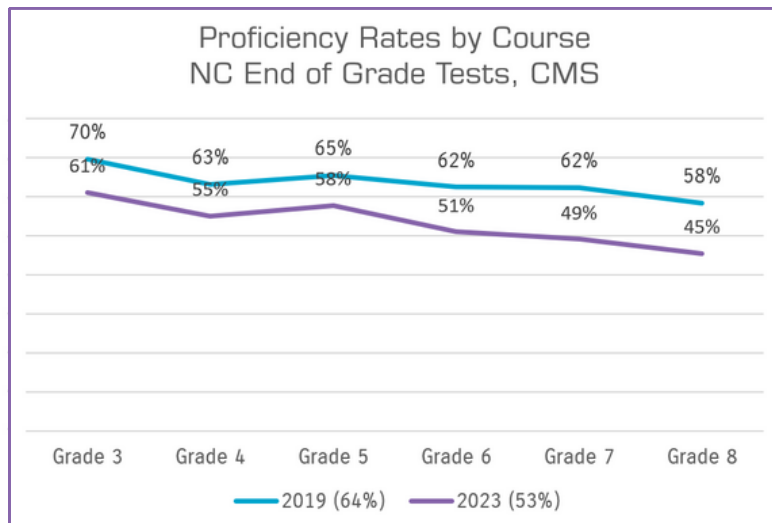
"WHEN MATH BECOMES FUN"

Adam Jupiter began tutoring virtually in 2020 and has come back to tutor in person every year since. Year after year, he enjoys sharing his love of math with his students. "I'm excited to meet my students and begin the amazing journey to get them to love math the way I do! I love nothing more than seeing the smiles on the kid's faces when math becomes fun," said Adam.

One first grade student began the program only able to count and recognize numbers under 10. She worked diligently each week, and towards the end of the year when she was tasked with counting to a much higher number, she exclaimed, "that's easy!" and proceeded with confidence.

THE NEED FOR MATH INTERVENTION

2023 End-of-Grade test scores showed progress from the prior year but indicated that only 53% of CMS third through eighth graders are performing at their grade level in math, remaining below pre-pandemic rates. Without intervention, scores tend to decline between fifth and eighth grade as course difficulty increases, which can negatively impact a student's success in high school and access to career and postsecondary options.



Teachers and families are doing all they can but have limited time to provide individualized academic attention. In response, Heart Math Tutoring recruits and supports hundreds of volunteer tutors to provide one-on-one, targeted academic support and encouragement. HMT focuses on students who do not have access to resources for private tutoring, and tutoring is provided free of cost to students and families.

“Heart Math [Tutoring] stood out to Accelerate for its focus on a high-need area, commitment to learning and improving as a tutoring organization and track record of student success”

-Accelerate Chief Operating Officer Dr. Nakia Towns

Lyons, Sierra. “Grant-Winning Nonprofit Sees Volunteer Tutors as Key to Closing Math Learning Gap.” *The74Million*, 11 September 2023

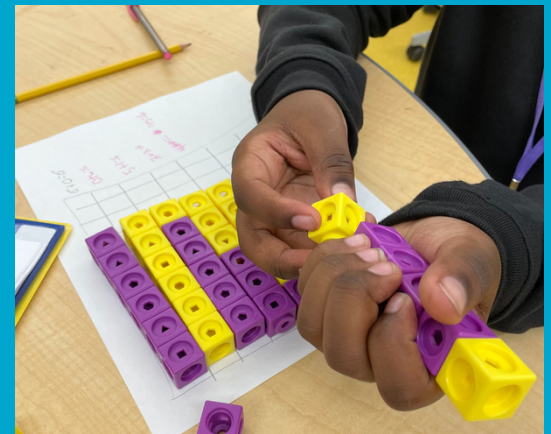
STUDENT STORY

“Justin,” a HMT second grader, began to exhibit disruptive classroom behaviors in the spring. HMT’s Program Coordinator learned from his teacher that Justin was struggling with his parents’ recent divorce. His teacher also mentioned that Justin frequently talked about his Heart tutor, “Sam,” and looked forward to their weekly sessions.

With permission, HMT’s coordinator shared with Sam about Justin’s circumstances and classroom challenges. Sam leaned into his role as mentor and during tutoring sessions would ask Justin how his day was going and encourage good choices.

With the help of Sam’s positive influence and commitment, Justin’s classroom behavior improved, and he moved through HMT’s curriculum quickly during tutoring sessions. In his post-assessment, Justin grew in 5 concept areas, mastering 3 of them! His teacher shared, “[HMT] helped me fill the missing gaps in my students’ learning so that I could address grade level skills the students needed.”

When his school renewed their commitment for the next school year, Justin’s mom visited the school’s front office to express gratitude for HMT’s program and request Sam as her son’s math tutor again!



REGIONAL EXPANSION

Heart Math Tutoring remains committed to growing the impact and scale of our core model within Charlotte-area schools and is excited to share the Charlotte model in separately-funded regional expansion efforts made possible through community support and volunteer leadership.



WINSTON-SALEM, NC

Thanks to outstanding volunteer leadership, key investments from local funders, and unanimous support from the Winston-Salem/Forsyth County School Board, Heart Math Tutoring is excited to begin programming at Bolton Elementary in the 2023/24 school year!

Learn more and get involved at:

www.heartmathtutoring.org/winston-salem

STEERING COMMITTEE

Connie Carlson, Claire Devon (Chair), Mike Devon, David Isaac, and Velvet Simington

CHARLESTON, SC

2022/23 was Heart's first full year operating in Charleston! 46 tutors from 20+ area organizations provided 61 elementary students with weekly 1:1 tutoring at Matilda F. Dunston Elementary and Ladson Elementary. Both schools will return in 2023/24, with the addition of Sanders-Clyde Elementary.

Learn more and get involved at:

www.heartmathtutoring.org/charleston

98%

of Charleston students showed growth on pre/post assessments that meets program goals set by elementary math specialists

96%

of teachers saw an increase in confidence and/or enthusiasm as a result of the program

83%

of teachers saw an increase in confidence and/or enthusiasm in subjects other than math!

100%

of volunteers rated the experience as positive

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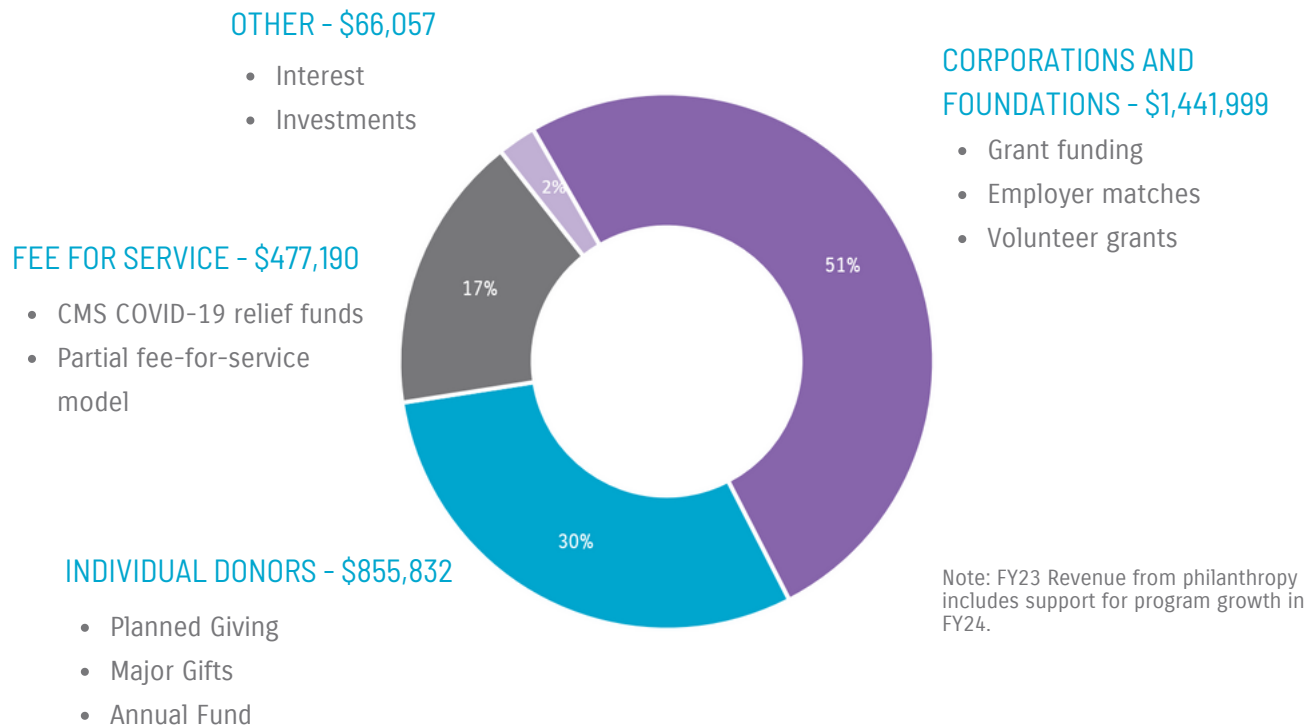
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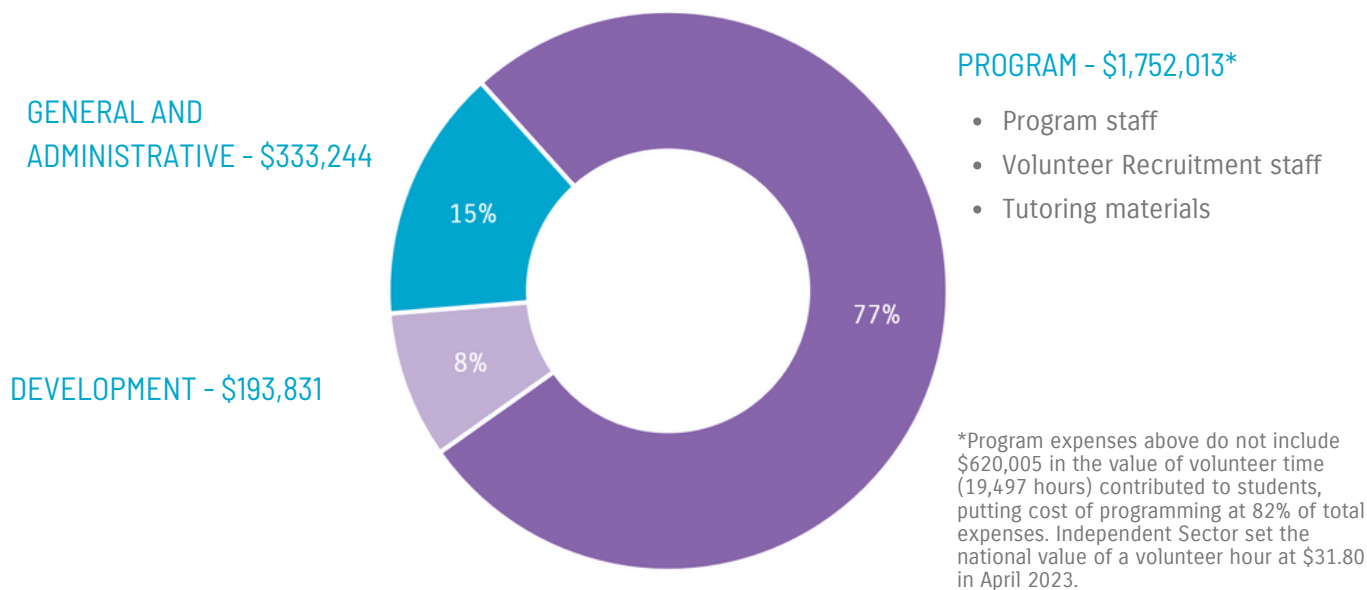
FY23 REVENUE

\$2,841,078



FY23 EXPENSES

\$2,279,088



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\$200,000+

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STAY ENGAGED

BECOME A TUTOR!

- Volunteer for 1 hour a week at one of 30 schools across Charlotte, Charleston, or Winston-Salem.
- Training, lesson plans, and onsite support are provided.
- Learn more and sign up: www.heartmathtutoring.org/volunteer

CELEBRATE 10 YEARS OF HEART MATH TUTORING WITH US!

- HMT Welcome Event - Fall 2023
- Keynote Speaker Event - February 2024
- Year-End Celebration - May 2024
- Find updates and details at www.heartmathtutoring.org/celebrate10

DONATE!

- Renew your support in FYE6/30/24 by mail, online, stock, or electronic transfer.
- Consider HMT as part of your estate planning.
- Contact marylauren.bishop@heartmathtutoring.org to discuss your impact as a donor!

