

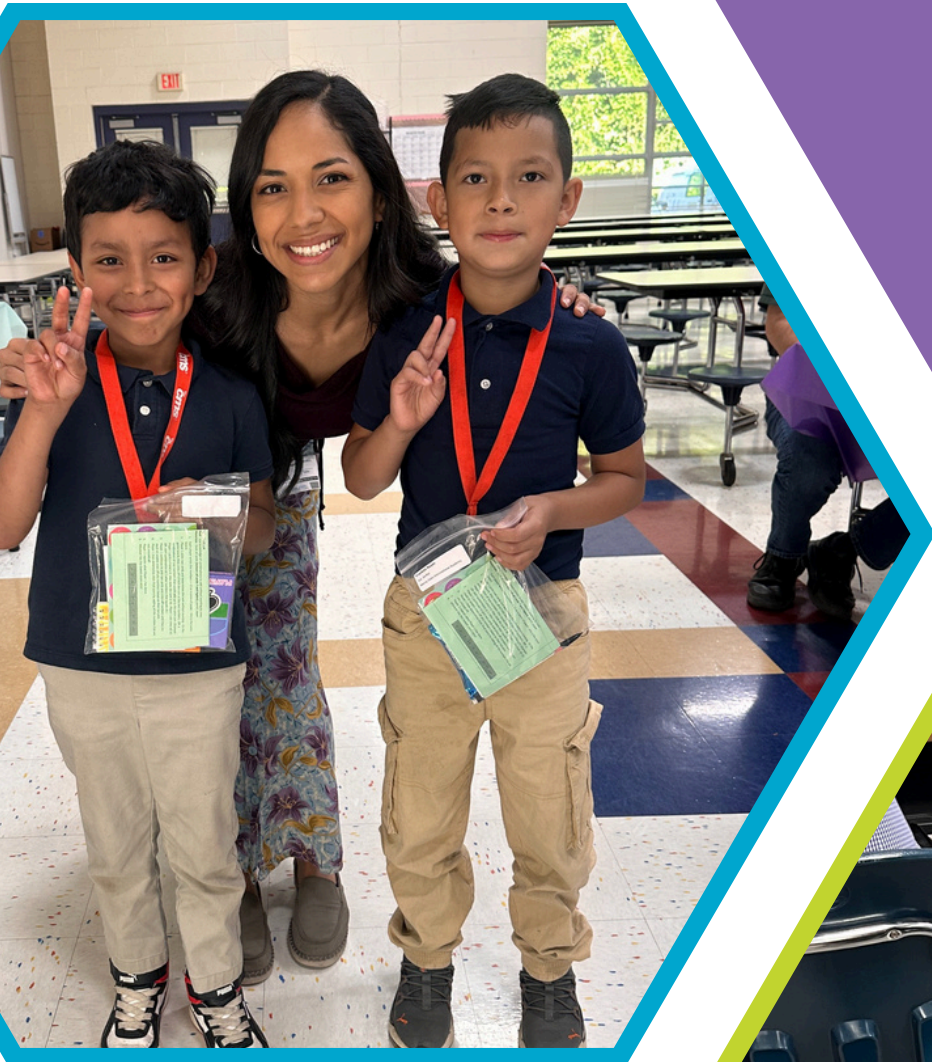
CHARLOTTE, NC

2024 ANNUAL REPORT

CONNECTING STUDENTS & VOLUNTEERS
FOR RESULTS THAT COUNT

"I LOVED SEEING MY HEART STUDENTS GROW THIS YEAR AND RECEIVE CONSISTENT INDIVIDUAL SUPPORT THAT IS HARD TO COME BY IN A TRADITIONAL CLASSROOM SETTING. I BELIEVE IN THIS PROGRAM AND AM HOPING TO SEE IT RETURN TO MY SCHOOL NEXT YEAR!"

-4TH GRADE TEACHER AT PARKSIDE ELEMENTARY





September 2024

Dear Heart Math Tutoring Partners,

Thank you for your support of a wonderful 2023/24 school year! Your gifts meant that 1,190 elementary students across 26 Charlotte schools had the chance to participate in one-on-one tutoring sessions twice a week, at no cost to their families. Heart students, many of whom attend schools that receive Title I federal funding and do not have access to resources for private tutoring, gained confidence, strengthened foundational math skills, and built meaningful relationships with their tutors. We are deeply grateful for your part in Heart's mission.

The 17,800+ hours of tutoring provided by Heart volunteers this year showed up in student results: 96% of Heart students demonstrated growth on pre/post assessments that met program goals set by elementary math specialists. Additionally, 93% of teachers reported a boost in Heart students' academic confidence. Thank you for your investment in Heart students' growth!

Our team is also energized by additional highlights from this year:

- Nearly 400 Heart tutors, donors, and partners celebrated Heart's 10th Anniversary as a nonprofit last February! Attendees heard the inspiring charge from keynote speaker Deborah Peart to remember that math should be part of our identity just like any other subject. If we are all readers and writers, why can't we all be "MATHers"?
- Heart has been building new capabilities in small group tutoring and grades 3-5 math curriculum over the past two years with the goal of preparing upper grade elementary students for middle school success. The successful Heart 3-5 afterschool program, fully funded by CMS COVID-19 relief funds, had a strong finish in 2023/24. Meanwhile, Jane's Fund sponsored an expanded version of Heart's school-day program in one school in 2023/24. Based on positive results in Year 1, this model will be offered in seven schools in 2024/25. See details on page 6.
- Programming launched at two sites in Winston-Salem/Forsyth County Schools and grew to a third site in Charleston County School District! Read more about expansion efforts on page 7.

Thank you for all you have made possible! Students remain the center of Heart's work. We look forward to reaching more students across the region in 2024/25 while deepening impact in Charlotte with your continued partnership.



With gratitude,

Emily Elliott Gaffney
Chief Executive Officer

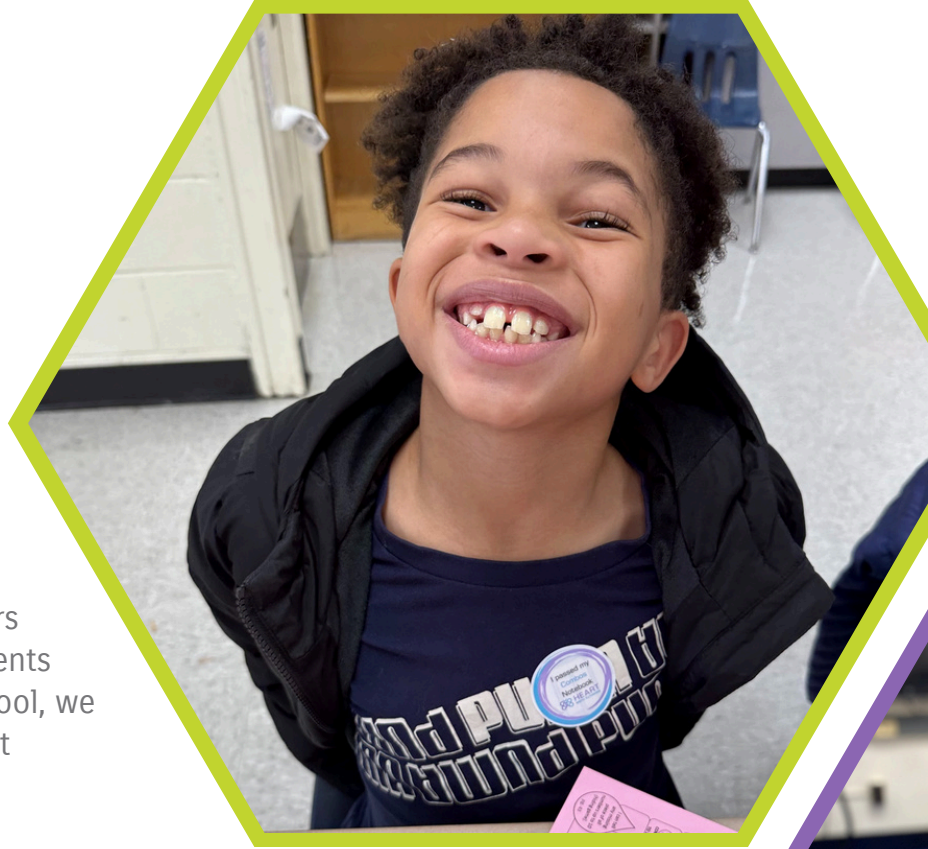


RESULTS FOR CHARLOTTE STUDENTS

2023/24 PROGRAM OUTCOMES

Support from HMT partners provided 1,190 students across 26 Charlotte elementary schools with 1:1 tutoring twice weekly delivered by 1,262 weekly volunteer tutors!

In line with Heart's commitment to innovation, 2023/24 programming included three delivery formats: students at 22 partner schools participated in the in-person program, while students at four school partners engaged in virtual tutoring with staff and students onsite and tutors joining remotely. At one school, we introduced an Extended Learning Program pilot detailed on page 6!



96% of students grew in 2 or more concepts, meeting program goals set with guidance from elementary math specialists!



On average, students grew in 4.5 concept areas.



93% of teachers believe their students showed increased confidence and enthusiasm in math.

"THIS PROGRAM HAS HELPED MY CHILD BECOME CONFIDENT WITH MATH. I SEE SO MUCH PROGRESS! HE GETS EXCITED ABOUT MATH EQUATIONS NOW INSTEAD OF FEELING DEFEATED."

-PARENT OF A HEART STUDENT

"Sam", a third-grade student at Westerly Hills Academy (WHA), was nominated by his teacher for participation in HMT. Sam began in the "Combinations to 10" notebook, a first-grade skill.

Each week, Sam worked through the games-based curriculum with his tutors. When he passed his "Combinations to 10" notebook, Sam jumped up with joy and happily received his sticker. He even brought the sticker back to show his other tutor the next day!

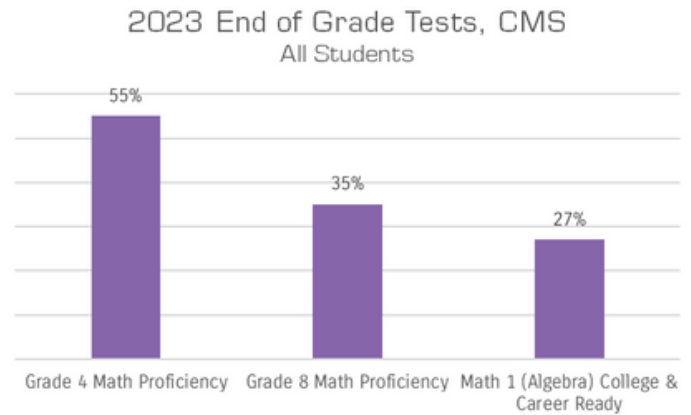
Erin, WHA's Program Coordinator, said, "He was so proud of himself and had an extra boost in confidence. After each session, Sam is excited to show me strategies he is using to think of numbers in terms of tens and leftovers!"



MEETING A LOCAL NEED

Only 55% of Charlotte-Mecklenburg Schools (CMS) fourth graders scored at or above grade level in math on 2023 End of Grade Tests. Without intervention, scores tend to decline as course difficulty increases, which can negatively impact a student’s success in high school and access to career and postsecondary options.

In the five-year strategic plan recently issued by CMS, one of four primary goals is to increase the percentage of students scoring College and Career Ready on the state’s End-of-Course test for Math I (Algebra) from 27% to 57% by 2029.¹



Research shows that concrete, targeted experiences with numbers in the early years can close gaps and prepare students for Algebra. Teachers and families do all they can but have limited time to provide individualized academic attention. High-quality tutoring that takes place during the day and among younger grades can yield “consistent and substantial positive impacts on learning outcomes.”³



THE US DEPARTMENT OF EDUCATION NAMED HIGH-IMPACT TUTORING AS A VITAL STRATEGY TO ACHIEVE ACADEMIC RECOVERY AND EXCELLENCE (2022).

With Heart, hundreds of volunteer tutors provide one-on-one, targeted support and encouragement, resulting in 97% of over 6,400 students served to-date meeting growth goals set with guidance from CMS and UNC Charlotte math specialists. HMT focuses on students who do not have access to resources for private tutoring, and tutoring is provided free of cost to students’ families.

ONLY 55% OF CHARLOTTE 4TH GRADE STUDENTS MEET GRADE LEVEL EXPECTATIONS IN MATH (2023 END OF GRADE TESTS)

1:1 VOLUNTEER-DELIVERED TUTORING, ONE HOUR PER WEEK WITH HEART MATH TUTORING

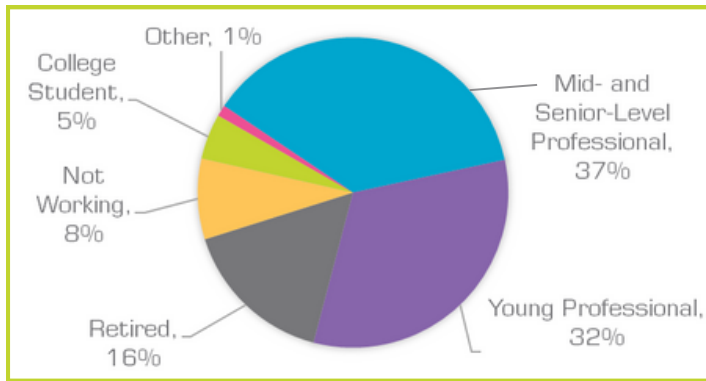
97% OF HEART STUDENTS TO DATE MEETING GROWTH GOALS BETWEEN PRE- AND POST-ASSESSMENTS

1. Charlotte-Mecklenburg Schools Strategic Plan 2024-2029, 2. Carpenter et. al. 2015, 3. Nickow, Oreopoulos, and Quan 2020



CHARLOTTE VOLUNTEERS

1,262 VOLUNTEER TUTORS IN 2023/24



1,262 tutors contributed 17,866 hours of tutoring, a collective value of \$598,332!¹



96% of 2023/24 tutors said they had a positive experience volunteering.



“HMT IS THE BEST MODEL FOR VOLUNTEERING THAT I HAVE EVER WITNESSED. TIME IS MAXIMIZED THROUGH PREPARED MATERIALS, READILY AVAILABLE SUPPLIES, AND COMMUNICATION LOGS. COORDINATORS ARE VALUABLE RESOURCES. STUDENTS LOVE THE ONE-ON-ONE TIME AND IT IS A DELIGHT TO WATCH THEIR CONFIDENCE AND ENTHUSIASM BLOSSOM. “

-2023/24 VOLUNTEER AT LANSDOWNE ELEMENTARY

KEY VOLUNTEER PARTNERS²

Volunteer tutors from sectors across the city commit to 1 hour each week at one of Heart’s partner school sites, where they receive on-site support from a Heart Program Coordinator and a fun, guided curriculum. To learn more or involve your corporate, civic, and faith group, contact volunteer@heartmathtutoring.org.



1. The Independent Sector set the national value of a volunteer hour at \$33.49 in April 2024. 2. Organizations with 20+ tutors in 2023/24

HIGHLIGHTS FROM HEART'S 10TH YEAR

CELEBRATING A DECADE OF HMT

In February 2023, HMT celebrated 10 years as a nonprofit in Charlotte with a special event at The Revelry North End, presented by Brighthouse Financial Foundation and Equitable Foundation. Nearly 400 Heart tutors, donors, teachers, staff, and community partners gathered to hear keynote speaker Deborah Peart share an inspiring message: “We want to make sure that students recognize that they can embrace mathematics as a part of their identity...They can think big, they can dream big, and math won’t be the obstacle that keeps them from becoming whatever it is they want to be.”



VOLUNTEER SPOTLIGHT

Alyson and Michael Fotia are entering their 10th year of volunteering with Heart. By tutoring together, they enjoy exchanging stories from tutoring sessions and sharing joy in their students’ progress throughout the year. Alyson shared, “My favorite part [of tutoring] is the excitement my student expresses when I ask them how they feel after completing a challenging lesson, mastering a new concept, or beating me in a competitive math game.” In 2023/24, Michael worked with a student who was quiet and shy on day one. By the end of the year, the student was confident not only in their answers, but in explaining how they arrived at their answers!

EXTENDED LEARNING PILOT

Sponsored by Jane’s Fund, 31 students in grades 3-5 at Merry Oaks International Academy received additional tutoring connecting the HMT curriculum to their classroom grade level standards! This pilot program integrates new research-based practices with the goal of increasing student readiness for middle school math and later success. Participating students met Fall to Spring MAP growth targets at a rate 9% higher than non-Heart students. The pilot will be replicated and evaluated in seven schools in 2024/25.

“MY [EXTENDED LEARNING PILOT STUDENTS] HAVE SHOWN HUGE GROWTH AND ARE EVEN SHOWING OTHERS HOW TO DO THE MATH LESSON. THEIR CONFIDENCE HAS GROWN DRASTICALLY.”

-4TH GRADE TEACHER
AT MERRY OAKS

HEART 3-5 WRAP UP

HMT concluded two years of a successful afterschool program, fully funded by CMS COVID-19 relief funds, at Renaissance West STEAM Academy. Students received small group tutoring in math three days per week from October to May. An unprecedented 80% of 61 enrolled students in 2023/24 met their growth goals on the standardized NWEA/MAP test! Elements from the program will carry forward into HMT’s Extended Learning Pilot.



GROWING WITH PURPOSE

Heart Math Tutoring remains committed to growing the impact and scale of our core model in Charlotte while also sharing the model with new regions. Expansion efforts are made possible through local community support, local volunteer leadership, and key donors!



CHARLESTON

Launched in January 2022, HMT Charleston completed its second full year of programming in 2023/24 and is providing tutoring to students at four school sites in 2024/25. Scan the QR code for Charleston’s Annual Report!



CHARLESTON ADVISORY BOARD

- Dr. Shakitha Barner, Trident Technical College
- John Cooper, Chair, Empower Charleston
- Stephanie Eikenberry, Fidelity Investments
- Dr. Karen Fonkert, Charleston Southern University
- Melissa Furr, Blackbaud
- Scott Olsen, PwC (retired), Empower Charleston
- Mark Petersma, Boeing
- John C. Read, Read Partners, LLC
- Wendy Sheppard, College of Charleston
- Joseph Weston, East Cooper Baptist Church
- Quanetta White, CCSD

“MY STUDENTS WERE SHOWING CONFIDENCE IN [MATH AND] ALL OTHER AREAS. IT WAS AMAZING TO SEE!”

- 2ND GRADE TEACHER AT LADSON ELEMENTARY, CHARLESTON, SC

WINSTON-SALEM

Following unanimous support from the WS/FCS school board in 2023, HMT Winston-Salem supported students at two schools in its inaugural year. Scan the QR code for Winston-Salem’s Annual Report!



WINSTON-SALEM ADVISORY BOARD

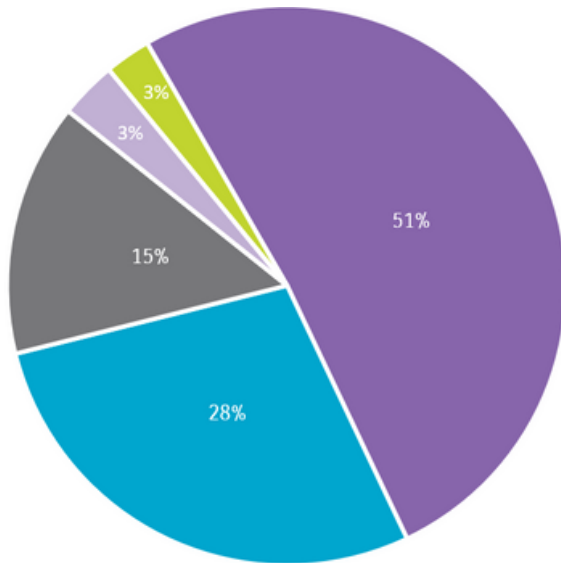
- Gray Barbour, First Bank
- Jeremy Burnett, Knollwood Baptist Church
- Garrison Dark, Reynolds American
- Claire Devon, Chair, Front Street Capital
- Richard Geiger, Community Volunteer
- Velvet Simington, WS/FCS
- Tom Westbrook, Five Points Capital

ORGANIZATION FINANCIALS

Across all programs and regions, Heart Math Tutoring generated \$3.8M in revenue and \$2.9M in expenses during FYE6/30/2024. Revenue includes support for program growth in FY25 and multi-year pledges received during FY24.

FY 24 REVENUE

\$3,781,493



CORPORATIONS AND FOUNDATIONS - \$1,939,281

- Grant funding
- Employer matches
- Volunteer grants

INDIVIDUAL DONORS - \$1,063,999

- Planned Giving
- Annual Fund

FEE FOR SERVICE - \$553,150

- CMS COVID-19 relief funds
- Partial fee-for-service

OTHER - \$125,063

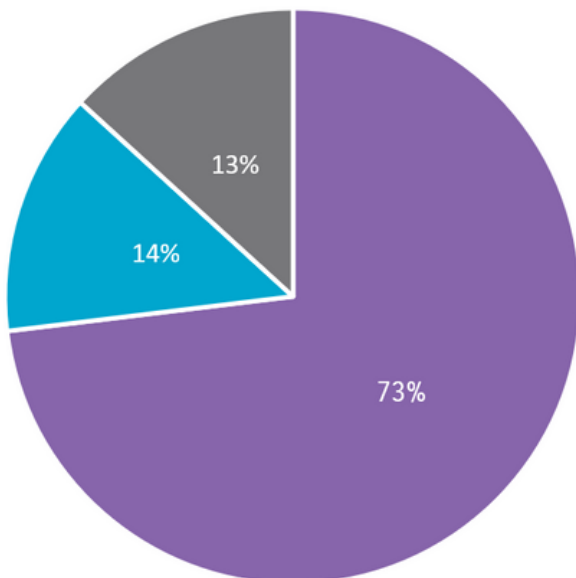
- Interest
- Investments

GOVERNMENT FUNDING - \$100,000

- SC Department of Education Grant

FY 24 EXPENSES

\$2,892,736



PROGRAM* - \$2,114,024

- Program staff
- Volunteer Recruitment staff
- Tutoring materials

GENERAL AND ADMINISTRATIVE - \$396,113

DEVELOPMENT - \$382,599

*Program expenses above do not include \$690,999 in the value of volunteer time (20,633 hours organization-wide) contributed to students, putting cost of programming at 78% of total expenses. Independent Sector set the national value of a volunteer hour at \$33.49 in April 2024.



CHARLOTTE FUNDING PARTNERS

\$100,000+

Accelerate*
C.D. Spangler Foundation Inc.
The Leon Levine Foundation
The Merancas Foundation

\$75,000+

Albemarle Foundation
The Belk Foundation
Faison Enterprises
Mecklenburg County Community Service Grants

\$50,000+

Bighthouse Financial
Lee Ann and Steve DeCarlo*
Lucille P. and Edward C. Giles Foundation
Sisters of Mercy of North Carolina Legacy
Stubblefield Foundation
Wells Fargo Championship

\$25,000+

Anonymous
Amy and Robert Brinkley*
Charlotte Merchants Foundation
Martha and Eric Eubank*
Heather and Tom Finke
Foundation For The Carolinas - Charlotte
Mecklenburg Community Foundation
Jane's Fund
National Gypsum
Stephen L. Cornwell Foundation
TD Charitable Foundation
The Dickson Foundation

\$15,000+

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Alpha and Omega Foundation
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EnPro
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George W. and Ruth R. Baxter Foundation
The James Family Foundation
Mindy and Bob Jones
George and Wandra Mackie
William C. and Norma C. Cannon
Charitable Trust

\$10,000+

Anonymous (3)
Duke Energy Foundation
First Presbyterian Church of Charlotte
Catherine and Mike Fischer
Gene and Vickie Johnson
Mark and Becky Linsz
Anna and Tom Nelson
Susan and Don Sherrill
Speedway Children's Charities
Donna and Richard Tadler

\$5,000+

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Denise and Jim Ratchford
Donald Renaldo
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Wendy and Jason Schmidly
St. Stephen United Methodist Church
Christianna and Matt Williams

\$2,500+

Christine and David Allen
Auslander Family Foundation
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Lisa and Tom Phillips
Meredith and Geordie Pierson
Jenn Schiess
Ann and Tom Temple
LouAnn and Scott Vaughn
Louise Whitley

\$1,000+

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Davidson Day School



THANK YOU TO THE INDIVIDUALS, FOUNDATIONS, AND CORPORATIONS WHO SUPPORTED HEART MATH TUTORING BY GIVING BETWEEN 7/1/2023 AND 6/30/2024. THESE FUNDS SUPPORT STUDENTS IN THE 2024/25 SCHOOL YEAR.

\$1,000+ (continued)

Andrew Dombrowski
 Mamie and Porter Durham
 Vicki and J. Porter Durham, Jr.
 Dr. David Elias
 Jane Elliott
 Judy Emken
 Mary and Nachum Eshet
 Marcia and Wesley Eubank
 Kris and Mary Hahn Fetter
 Alyson and Michael Fotia
 Alex and Patty Funderburg
 Emily and Mike Gaffney
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 Joe and Carol Gigler
 Ruth Ellen and Thold Gill
 Kelly and Meredith Graves
 Gary Green
 Matt Gromet and Phyllis Schultz
 Lise Hain
 Carol and Watts Hamrick
 Sian Harris
 Terry Harris
 Harvard Business School Alumni Association
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 Kathy and Steve Horvath
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 Natalie Schembra
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 Lucy and Keith Trent
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 Linda and Phil Vanderbosch
 Patrick and Elizabeth Vaughn
 Helen and Peter Wallace
 Alec and Mayleng Watson
 Charlie and Brooke Weeks
 Andrew Weiderman
 Julia Woodside
 Andrew Yavorski

\$500+

Anonymous (4)
 Jennifer Akeley
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 Selwyn Avenue Presbyterian Church
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 Allen and Sarah Shifflet
 Susan and John Shimp
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\$500+ (continued)

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 Kathryn and Mark Thompson
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 Jo Van Dyke
 Geordie and Gray Walker
 Melissa and Todd Walker
 Liz Wahls and David Weinrib
 Leigh Wilkinson
 Kim and Evan Wilkoff
 Al and Susan Winget
 Yield Giving
 Catherine and Carl Zimmerman

The following organizations provide matching gifts and/or volunteer grants:

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 Edward Jones
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Gifts were given in memory of:

Gail W. Bunn
 Paul Cutter
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Gifts were given in honor of:

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 Lillie Cochran and Ben Cauble
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 Martha and Eric Eubank
 Catherine Fischer
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 Ann and Tom Temple
 Jo Van Dyke
 Padgett Vaughn
 Susanne Whitesides
 Barbara and Chuck Williamson
 Winget Park Elementary EC and Admin Staff
 Michael Greksa and Margaret Wittman

Heart Math Tutoring's Charleston and Winston-Salem programs are locally funded. Scan the QR codes on page 7 for full donor lists.

Charleston, SC (\$10,000+)

Anonymous
 Boeing
 Davis and Beverly Marksbury Foundation at Bluegrass Community Foundation
 Davis and Stacie Marksbury
 South Carolina Department of Education
 Donna and Richard Tadler

Winston-Salem, NC (\$10,000+)

John and Mary Louise Burress
 Front Street Capital
 Reynolds American Foundation
 The Winston-Salem Foundation

"IT IS OUR HOPE THAT HEART STUDENTS SOAR ACADEMICALLY AS THEY PROGRESS INTO MIDDLE AND HIGH SCHOOL; AND THAT MATH BECOMES FUN RATHER THAN AN IMPOSSIBLE TASK IN SCHOOL."

-ANDY MERMANS, PRESIDENT & CHAIRMAN OF THE MERANCAS FOUNDATION



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Pamlico Capital

Anne Leggett
Community Volunteer

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

CORE VALUES

- Student-Centered
- Gratitude
- Growth Mindset
- Precision and Reliability
- Civic Engagement





LOOKING AHEAD

BECOME A TUTOR!



Heart always has a need for tutors! Volunteer for 1 hour a week at one of 23 schools across Charlotte in 2024/25. Training, lesson plans, and onsite support are provided for both virtual and in-person tutors. Scan the QR code to learn more and sign up. Contact volunteer@heartmathtutoring.org to learn how to engage your corporate, civic, or faith group.

INVEST IN HEART'S MISSION!



We are grateful for the many community members and organizations that are committed to helping Charlotte students build math skills and confidence. As HMT's program has grown, so have investments in staff, curriculum, and operations. We hope you'll consider renewing or increasing your gift as Heart enters its next decade of impact. Scan the QR code to donate today, or contact glenda.mauck@heartmathtutoring.org for more information on how you can partner with Heart to make a difference in the lives of our community's highest-need students.



\$2,000 sponsors a student in one-on-one math instruction for an entire school year.



\$6,000 provides one "class" (3 students) with one-on-one math instruction for an entire school year.



\$10,000 provides one "grade level" (5 students) with one-on-one tutoring for an entire school year.



\$25,000 funds the on-site costs of a Program Coordinator - the part-time Heart staff member who ensures seamless program delivery for tutors and students - at one school.



\$50,000 funds the on-site costs of an Extended Learning Program Coordinator - the full-time Heart staff member who ensures seamless program delivery for tutors and students AND delivers a third tutoring session to 3rd-5th graders to help prepare them for middle school.



\$100,000 covers philanthropy needed to operate the average Heart school site; providing tutoring for ~50 students.

"THE TUTORS MAKE LEARNING FUN FOR STUDENTS WHO ARE STRUGGLING WITH MATH...AFTER EVERY SESSION, MY CHILD CAME HOME EXCITED TO SHARE WHAT SHE HAS LEARNED. THE COMMUNICATION WITH PARENTS IS ALSO HELPFUL, AS IT ALLOWS US TO CONTINUE THE METHODS THAT ARE USED DURING TUTORING."

-PARENT OF A 2023/24 HEART STUDENT



