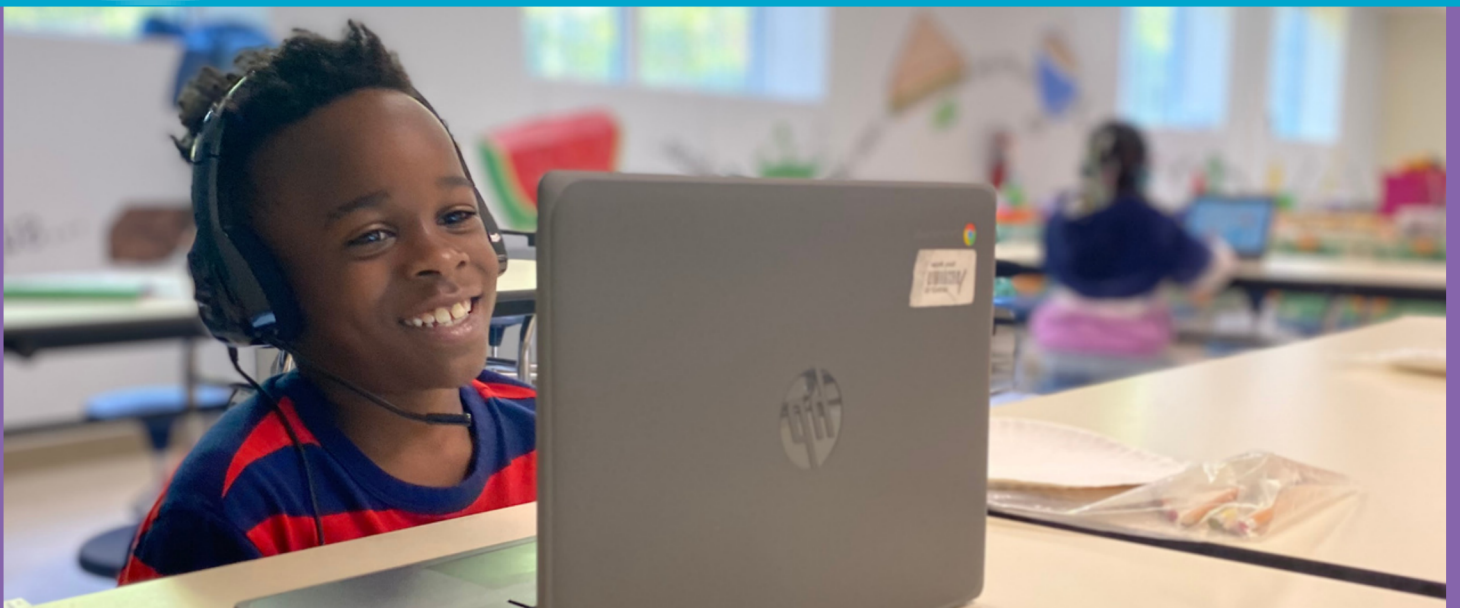




# 2022 ANNUAL REPORT





"Heart [Math] Tutoring was essential in helping my son get to where he needs to be to meet grade level expectations! I am just so thankful for this program!"

- Parent of a Heart student at Endhaven Elementary

September 2022

Dear Donors and Funding Partners,

Thank you for providing individualized tutoring for 935 students across 24 schools during the 2021/22 school year! Because of your generosity, students across Charlotte built math skills and academic confidence through one-on-one support from dedicated tutors. Students returned to school facilities in 2021/22 after being remote for the majority of 2020/21 and made great gains despite lingering challenges from COVID-19. We are pleased to report:

- 97% of Heart Math Tutoring (HMT) students showed growth in math between pre- and post-assessments that meets goals set by math specialists at UNC Charlotte and Charlotte Mecklenburg Schools.
- 90% of teachers reported that HMT students' academic confidence increased following participation in the program.

Volunteers excitedly returned to school facilities in 14 schools, and HMT offered its first iteration of school-based virtual tutoring at 10 school sites. In the virtual model, HMT Program Coordinators are on-site with students, and volunteers join remotely. An encouraging 95% of virtual students met program growth goals. When asked how she felt at the end of her session, a student participating in the virtual program at Devonshire Elementary said, "A little more smart, and a little more happy." This will be a model we can continue to deploy strategically to reach more students.

Donors provide the staffing and curriculum materials that make it possible to efficiently leverage volunteer tutors without adding work to school staff. In all, 1,135 volunteer tutors (including many of you) dedicated one hour each week, giving over 16,444 tutoring hours collectively in 2021/22 that would not have existed otherwise. **Thank you!**

2022/23 will mark over 10 years of HMT serving the Charlotte community. The excellent work of our students, tutors, donors, partners, and staff has opened doors to several new initiatives you'll see on page 7, including (1) the program's first expansion outside of Charlotte, as we seek to reach 100 students in Charleston, SC this year, and (2) an innovative afterschool program at Renaissance West STEAM Academy targeting grades 3-5 math standards through small group tutoring, funded through CMS COVID-19 relief funds.

Heart Math Tutoring exists to give young students successful experiences in math through tutoring, knowing that early success in math opens doors to long-term opportunity. Thank you for your support that makes all of this possible.

With gratitude,



Emily Elliott Gaffney  
Executive Director



Starting my week strong with Monday tutoring at Lansdowne Elementary!

Support from donors and funding partners provided 1:1 tutoring twice weekly for 935 elementary students across 24 Charlotte-area schools, thanks to help from 1,135 volunteer tutors!

2021/22 programming included a mix of 14 in-person school sites and 10 school sites that delivered HMT's new virtual model.

"Heart Math Tutoring is an extremely positive experience for our students. In my three years of working with HMT, I have watched students blossom with confidence in their ability to complete 'hard tasks.' It is amazing to see their growth not only in academic areas, but in their belief in themselves."

- Chandler Wilson, 1st Grade Teacher at Charles Parker Academic Center

The virtual model proved successful, with 95% of virtual students meeting program growth goals! On average, virtual students demonstrated growth in 4.35 concept areas. Moving forward, Heart will build upon learnings to continue utilizing both virtual and in-person modalities, which will allow more students access to 1:1 math tutoring.

# 97%

of all 2021/22 students demonstrated growth in two or more concepts, meeting growth goals set with guidance from UNCC and CMS elementary math specialists.

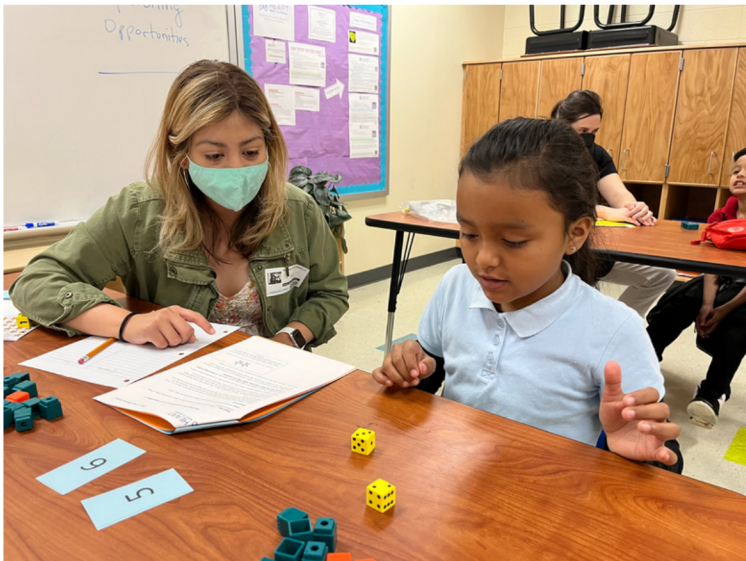
On average, students enrolled in Heart Math Tutoring demonstrated growth in

# 4.5

concept areas.

# 90%

of 2021/22 teachers believe their students enrolled in Heart showed increased confidence and enthusiasm in math as a result of the program.

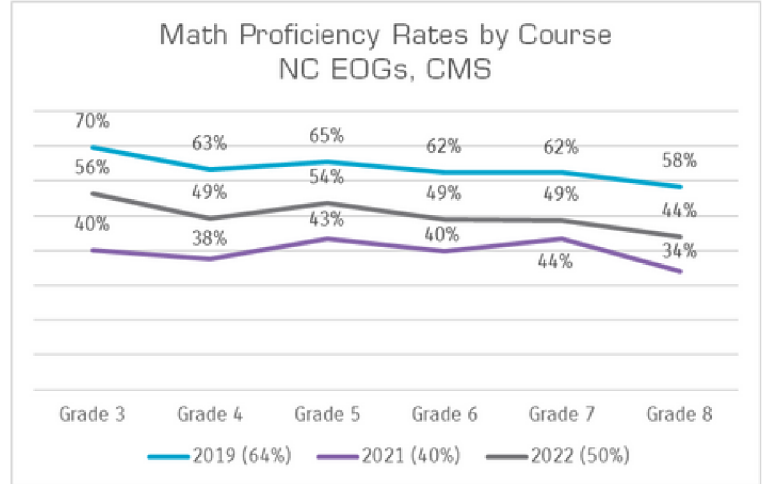


A Montclair student (left) and a Myers Park Traditional student (right) both use dice to compare numbers with their tutors!

2022 End-of-Grade test scores indicated that only 50% of CMS third through eighth graders are performing at their grade level in math, representing an increase from 2021, but remaining below 2019 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.

HMT partners with elementary schools, assesses student needs, provides an effective curriculum, and places a Program Coordinator on-site to support volunteer tutors, who work 1:1 with students during the school day. In our in-person model, 98% of students to date have met program growth goals in math, and 90% of teachers annually report their students' confidence and enthusiasm towards academics has increased following participation in the program.

HMT focuses on students who may not have access to resources for private tutoring. We believe that all students deserve to understand numbers at high levels and can do so with targeted, hands-on practice.



A Smithfield student measures the table with groups of ten to begin internalizing place value and our base-ten number system.

"[HMT] opened my eyes to the struggles that some students face in their educational journey, and it made me want to work with students more to help them succeed."

- 2021/22 Volunteer at Hidden Valley Elementary

## 2021/22 SCHOOL PARTNERS

Billingsville Elementary\*

*Blythe Elementary*

Bruns Avenue Elementary

Charles Parker Academic Center\*

Cotswold Elementary\*

*Devonshire Elementary\**

Endhaven Elementary

Hidden Valley Elementary\*

Highland Renaissance Elementary\*

Huntingtowne Farms Elementary

Joseph W. Grier 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

Statesville Road Elementary\*

Sterling Elementary\*

Westerly Hills Academy

Whitewater Academy

\*denotes virtual tutoring site. *New school partners listed in italics.*

## 2021/22 VOLUNTEER PARTNERS providing 20+ tutors



# 1,135

individuals dedicated at least 30 minutes each week as volunteer tutors in 2021/22.

# 98%

of 2021/22 volunteers rated their experience as positive

# 98%

of 2021/22 volunteers said they saw improvement in their students' math skills

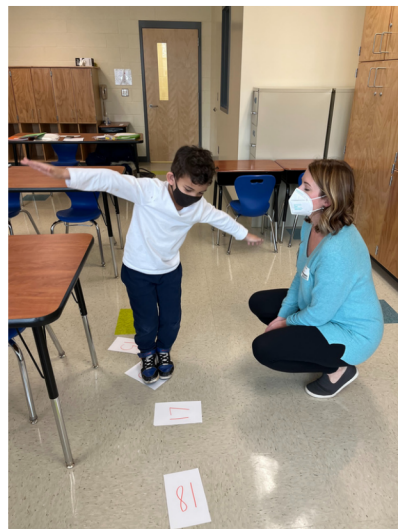
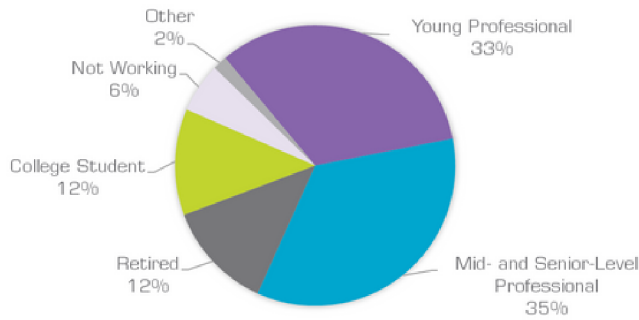
# 364

tutors opted into Heart's Diversity, Equity, and Inclusion Network, which offered additional tutor trainings and discussion sessions.

"HMT was the highlight of my week this year! I had such a great time watching my [students] grow and learn. I can't wait to come back next year!"

- 2021/22 Volunteer at Bruns Avenue Elementary

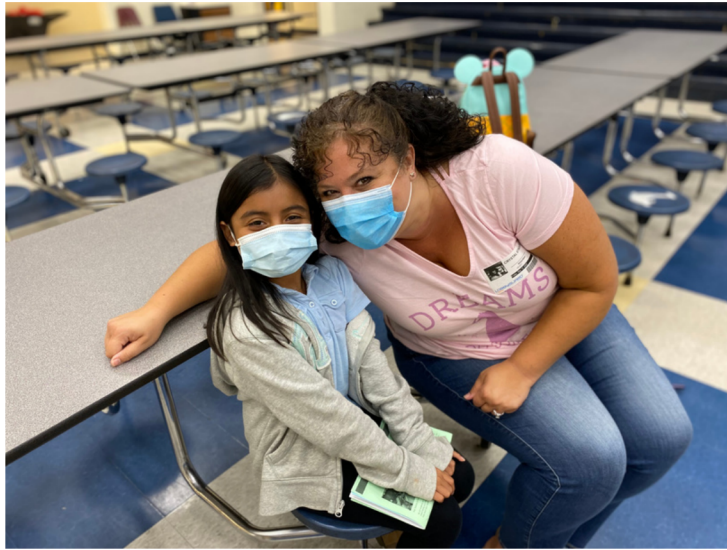
## 2021/22 VOLUNTEERS



(Left) With encouragement from her tutor, a Rama Road student colored her goal board to represent the progress she'd made in tutoring so far. (Center) When a Montclaire first grader was having trouble focusing, his Program Coordinator and tutor introduced a creative "brain break" in which he could practice math while moving around! (Right) Volunteers from PwC, a Heart partner organization, helped organize and pack cubes for student math kits over the summer!

Fifth-year volunteer tutor Crystal Stroupe initially found Heart through her work at Bank of America. Crystal describes connecting with Heart's mission: "When I saw this was geared towards tutoring focused on historically underdeveloped neighborhoods and schools...as well as students that if they didn't have this program they may be missed and kind of fall between the cracks, it was an immediate click."

Since beginning with Heart in 2018, Crystal has tutored in-person at Whitewater Academy and



Endhaven Elementary, as well as virtually at Devonshire Elementary. Crystal has seen first-hand the growth in her students' confidence in math. She talks about a student she tutored her first year with Heart who had recently moved to the US and was having difficulty on math tests in her classroom. Crystal remembers talking with the student and working hard based on the teacher's feedback; she fondly recalls when, "The student came running up, jumping: she had gotten her first 100 on a test! That was the best feeling ever. What a big difference and what a big turnaround."

## PROGRAM SPOTLIGHT: MARIA ALMANZA

Maria Almanza is a Program Coordinator and Translation Specialist for Heart Math Tutoring. A Charlotte native, Maria attended CMS schools throughout elementary, middle, and high school. Now, in her fourth year with HMT, she works closely with volunteers, students, and staff at Charles Parker Academic Center and Sterling Elementary, two of Heart's virtual school sites. "[Being a Program Coordinator] is incredibly gratifying and offers a great balance of working with schools, students, and volunteers who may have different life experiences. Volunteers share their knowledge with the students, but I am learning too," says Maria. "It is so impactful for Heart students to have two dedicated tutors in their lives who support them at this early age." **One of Maria's students, a 5th grader, shared that he wanted to be a lawyer when he grew up. Both of his tutors that year were lawyers! When he graduated from the program, he told her, "They were the best tutors I ever had."**

Maria enjoys seeing students and tutors connect over the screen in virtual tutoring. "In addition to math, the students are accumulating a lot of social skills very quickly. I am impressed by the students' ability to learn, ask questions, and ask for help when they need it. Sometimes they even help their tutors with technical difficulties!"



Since its establishment as a nonprofit in 2013, HMT has grown from serving two to 26 school partners (2022/23 school year) in Charlotte. We remain committed to continuing to grow the impact and scale of our core model within Charlotte-area schools, and we are embarking on several new, separately funded initiatives.

## HEART 3-5

Funded entirely through a new, out-of-school time initiative from Charlotte-Mecklenburg Schools, the Heart 3-5 program at Renaissance West STEAM Academy is different but highly complementary to Heart's core model. Heart 3-5 utilizes trained, paid tutors to provide small group instruction for students 3 hours per week for 27 weeks. This program, in correlation with Heart's core model, creates a pipeline of support, from foundational skills to Grades 3-5 Math standards, to better ensure students perform at or above grade level in math.



## ACCELERATING STUDENT IMPACT

Third party evaluation continues to find correlation between mastery of skills covered in HMT's core program and success on standardized measures of math proficiency. HMT, with letters of recommendation from Belk Foundation and Read Charlotte, was accepted to the learning cohort of Accelerate, an initiative powered by America Achieves and the National Student Support Accelerator at Brown University and created to address learning needs exacerbated by the pandemic. As one of the only elementary math interventions operating at scale, HMT will engage in evaluating and implementing tutoring best practices with providers across the nation through participation in Accelerate.

## HMT CHARLESTON

In partnership with Charleston-area leaders and funded by Charleston-area philanthropy, HMT expanded outside of Charlotte to the Charleston, SC area during the 2021/22 school year. HMT completed a successful pilot program at Ladson Elementary School in Charleston County School District with plans to expand to a second school site and a total of 100 students in the 2022/23 school year. Volunteer leaders championing the efforts in Charleston through the HMT Charleston Steering Committee are: John Cooper (Chair), SVP Charleston; Eric Eubank, Pamlico Capital; Karen Fonkert, Ph.D., Charleston Southern University; Marina Hart, Longshore Boats; Scott Olsen, PwC (retired), SVP Charleston; Wendy Sheppard, College of Charleston; and Joseph Weston, PwC.



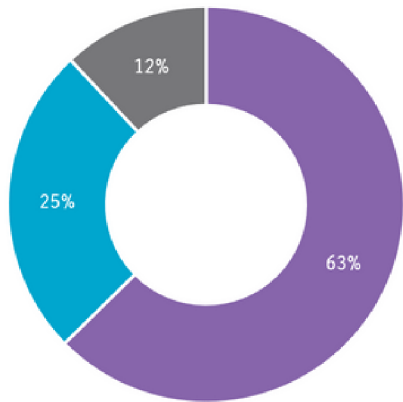


HMT Program Coordinator Liz Wahls conducts a "mini-assessment" for a student during a tutoring session.

"It's such a pleasure to support a wonderful organization that's making such a difference in the local school system!"

- HMT Donor and Volunteer Tutor

Thank you to all who contribute to Heart Math Tutoring students' success through financial support!

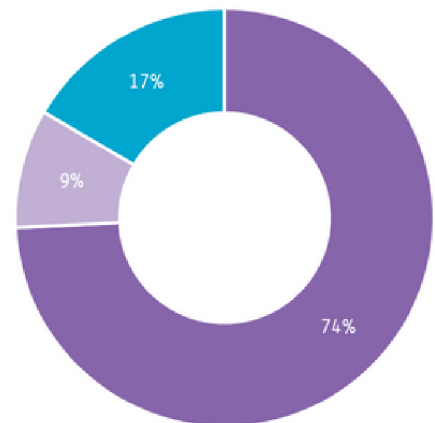


### 2021/22 SCHOOLS REVENUE

Corporations and Foundations	\$1,045,804
Individual Donors	\$423,524
CMS Fee for Service	\$203,000
<b>Total</b>	<b>\$1,672,328</b>

### 2021/22 SCHOOLS EXPENSES

Program*	\$1,155,763
Development	\$142,920
Administrative	\$258,093
<b>Total</b>	<b>\$1,556,776</b>



Note: The above charts refer to philanthropic contributions raised and expenses for the Charlotte 2021/22 Schools campaign. HMT Charleston, Heart 3-5, and other special projects are separately funded and are not included in the financials above. Surplus revenue will be allocated to support local strategic growth.

\*Program expenses above do not include \$492,498 in the value of volunteer time (16,444 hours) contributed to students, putting cost of programming at 80% of total expenses. Independent Sector set the national value of a volunteer hour at \$29.95 in April 2022.

# FUNDING PARTNERS

## 2021/22 SCHOOL YEAR

### \$100,000+

Albemarle Foundation

### \$75,000+

C.D. Spangler Foundation  
The Merancas Foundation

### \$50,000+

Bank of America Charitable Foundation  
Brighthouse Financial Foundation  
The Belk Foundation  
Lucille P. and Edward C. Giles Foundation  
Faison  
The Leon Levine Foundation

### \$25,000+

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Charlotte Mecklenburg Community Foundation  
Charlotte Merchants Foundation  
The Dickson Foundation  
Heather and Tom Finke  
GEM Foundation  
Susan and Don Sherrill

### \$15,000+

William C. and Norma C. Cannon Charitable Trust  
Stephen L. Cornwell Foundation  
Lee Ann and Steve DeCarlo  
Duke Energy Foundation  
The James Family Foundation  
Donna and Richard Tadler

### \$10,000+

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Gene and Vickie Johnson  
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TIAA  
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### Thank you to the following organizations for providing matching gifts and/or volunteer grants:

Albemarle Foundation, Ally Financial, Bank of America Charitable Foundation, Barings, Crowder Constructors, Duke Energy Foundation, Faison, Flagship Healthcare Properties, LLC, Frontier Growth Foundation, GEM Foundation, Genentech, McKinsey & Company, Microsoft, PepsiCo, Piper Sandler Companies, PwC, Raytheon Technologies, Salesforce, SPX, Synchrony Financial, The Duke Endowment, TIAA, Wells Fargo, and White Mountains Insurance Group

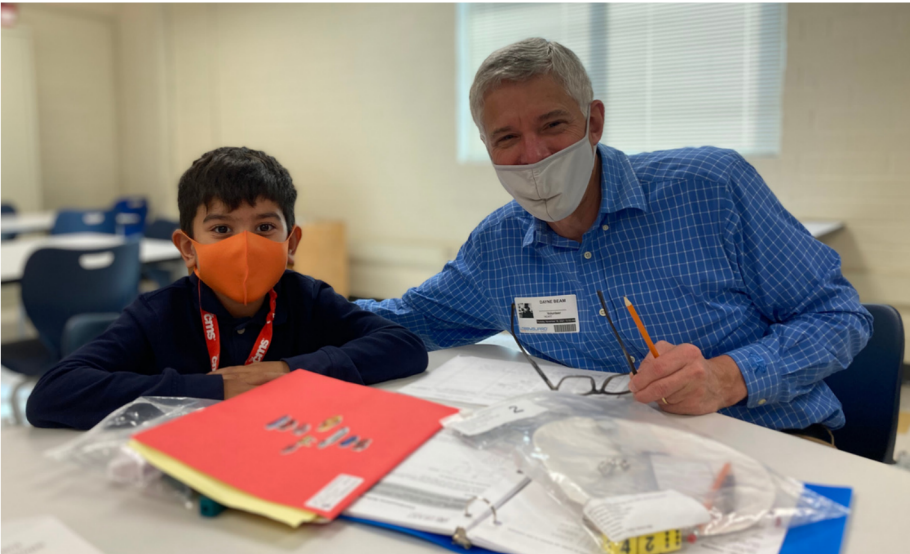
Heart Math Tutoring is offering a mix of virtual and in-person tutoring at 26 schools in the 2022/23 school year, serving 1,300 Charlotte elementary students through 1:1 support from dedicated volunteer tutors.

We extend our gratitude to our lead funding partners for the 2022/23 school year: Albemarle Foundation, C.D. Spangler Foundation, Faison, and the Merancas Foundation!



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 be a volunteer tutor!

Learn more and consider becoming a volunteer tutor by visiting [www.heartmathtutoring.org/volunteer!](http://www.heartmathtutoring.org/volunteer!)



"This was my first experience with a program of this caliber. I'm very grateful to have had this valuable resource this year!"

- Marjorie Davis, 3rd Grade Teacher at  
Lansdowne Elementary

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- Danell Cooper, 1st Grade Teacher at Merry Oaks International Academy



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The mission of Heart Math Tutoring is to ensure 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.

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