

2019 ANNUAL REPORT

Connecting Students & Volunteers
for Results that Count





“ My students really enjoy the time with their Heart tutors. They are a great bunch of people. Students have more confidence in themselves and contribute more in the classroom. Thank you so much for spending the time to help my students grow. ”

Susan Marchisio, Third Grade Teacher at Piney Grove Elementary



2019 ANNUAL REPORT

September 2019

Dear Donors and Funding Partners –

Thank you for your support in the 2018/19 school year! You gave skills and confidence to almost 1,000 students, across 22 Charlotte schools! On behalf of our staff and board, we are eager to share highlights of what your support accomplished over the past year and to report back on your investment.

In this 2019 Annual Report, we are focusing on “planting seeds” and “growth” for our students, along with some exciting seeds planted at the organization level – bearing fruits for future Heart Tutoring students!

In 2018/19, 98% of 995 students who completed the program met program growth goals on pre- and post- assessments. On page six you will see a red/green coded chart showing their progress on the specific building block skills. Teacher feedback was strong, with 92% saying that their students demonstrated improved confidence and/or enthusiasm in math because of the program.

At the organization level, Albemarle Foundation and Bank of America joined you as investors with a five-year \$1.25M combined commitment – our largest and longest commitment to date! See page eight. Their gift will support approximately five school sites per year, enabling continued program growth and student impact. As an organization that is just six years old, we would not have been eligible for a grant of this magnitude without the significant investments you have made and continue to make.

Additionally, our staff and partners completed a 450+ hour build of a highly customized student database on the Salesforce platform. The resulting infrastructure of this one-time, significant investment will be a key ingredient to accelerating student outcomes and maintaining program quality as we grow.

I am proud of this past year and grateful for donors, volunteers, staff, board members, and partners who are behind the success and overall growth you will see in this report. THANK YOU for being part of this work!

With gratitude,

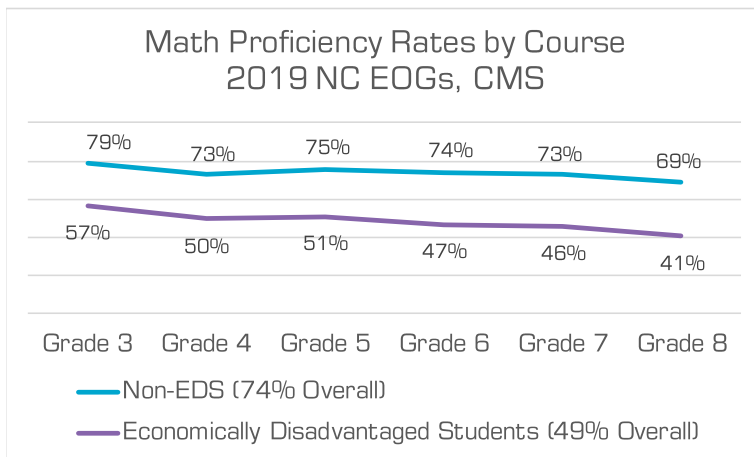


Emily Elliott Gaffney
Executive Director, Heart Math Tutoring

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.

MATH MATTERS

The Need for Math Proficiency



Only **49%** of economically-disadvantaged students in Charlotte-Mecklenburg Schools (CMS) performed on grade level in math on 2019 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 (left).

Researched methods show that targeted, hands-on experiences with numbers in early years can close students' gaps in understanding. However, teachers have limited capacity to provide the individualized attention needed, especially in high-poverty schools.

In response, Heart Math Tutoring recruits and supports tutors in **the only volunteer-delivered math intervention** used during the school day in CMS.

“Heart Tutoring volunteers provide 50 hours per week of one-on-one, aligned instruction to each school that otherwise would not be available to our students.”

-Dianne Powell, Director, Charlotte-Mecklenburg Schools

Math and Economic Mobility

In 2013, Charlotte ranked 50 out of 50 in a national study of economic mobility. The chances of escaping poverty in Charlotte are some of the worst in the nation. Factors of mobility include school quality, segregation, and social capital.¹

Math is a key piece of public school quality, and being proficient in math matters for early success in school, confidence, high school graduation, and post secondary and career options. Researchers were surprised to find in 2007 that math even matters for *reading* skills! Several studies found that early math skills were most correlated with *literacy* skills compared to early literacy skills and social-emotional factors.² Math is critical for long-term opportunity!

In addition to supporting students' math development, Heart Tutoring connects children with volunteers from Charlotte business, faith, and civic groups who bring experiences and relationships that broaden students' outlook. With ~90% of volunteers finishing the full year, tutors offer the dependable presence of a mentor and the exchange of social capital.



“We need to address the reality that children who 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.” *-Leading On Opportunity report, Charlotte-Mecklenburg Opportunity Task Force, 2017*

1. Chetty et al., *Where is the Land of Opportunity? The Geography of Intergenerational Mobility in the United States*, 2014

2. Greg Duncan, et al., 2007

Kathy Richardson Visit

Heart Tutoring's model is based on assessments written by Kathy Richardson, co-founder and Program Director of Math Perspectives Teaching Center in Bellingham, Washington. Several from our team had the privilege of eating dinner with Richardson and her colleagues during her visit to Charlotte for her Math Leadership Institute conference.

Richardson shared about her journey from classroom teacher to elementary math specialist and why she began to love teaching math in the first place: it was through seeing what happens to students once they realize that they are good at math. **Understanding math and numbers helps students understand things about themselves – that they can figure things out; that they count and are important; and that they have a place in the world.**



Over 3,000 Heart Tutoring students to date have benefitted from the powerful (and empowering) one-on-one assessment interviews written by Kathy Richardson and Math Perspectives. What an honor, and what fun, to have her in the Queen City for a week!

Photo from Left to Right: Math Perspectives Instructor Jean Church, Ph.D.; HMT Program Director Cydney Kramer; Math Perspectives Program Director Kathy Richardson; HMT Senior Program Manager Padgett Vaughn; HMT Executive Director Emily Gaffney; and Math Perspectives Instructor Kay Middleton, PhD.

Math Mindsets



Strong math mindsets support character development and life-skills!

Sense-making – After a year of tutoring activities, we see students start to believe that math makes sense. Children struggle when they “approach the learning of mathematics as tasks to complete rather than as a sense-making process”, says Kathy Richardson¹. The “sense-making process” involves using prior knowledge to figure out new things and using reason and logic to verify findings. As a result, students become less reliant on the adult (teacher, tutor or parent) and start to rely on their own ability to figure things out.

Perseverance – In tutoring, students are placed in lessons that are at the appropriate level of challenge, based on the program pre-assessment. In the safe and encouraging tutoring environment, they learn to “try again” or “try a new strategy” when a problem is difficult. When they are successful, they learn through experience that persistence pays off!

Growth Mindset, Goal Setting – When students meet goals and pass to new curriculum levels during tutoring, they strengthen their belief that they can learn new things and that abilities can be developed through practice.

“Our scholars embrace a growth mindset knowing their Heart tutor is helping them fill gaps and become stronger.” -Bridget Wilson, Principal at Joseph W. Grier

1. Clements, D., Sarama, J., & DiBiase, A. (Eds.) (2004) *Engaging young children in mathematics: standards for early childhood mathematics education*. Manwah, NJ: Lawrence Erlbaum Associates.

YOUR IMPACT ON STUDENTS

2018/19 Program Recap

In the 2018/19 school year, 995 students in grades 1-5 received tutoring for 30 minutes, twice per week, at the 22 partner schools below.

- ▶ Allenbrook Elementary
- ▶ Barringer Academic Center
- ▶ Billingsville Elementary
- ▶ Berewick Elementary
- ▶ Cotswold Elementary
- ▶ First Ward Creative Arts Academy
- ▶ Greenway Park Elementary
- ▶ Hidden Valley Elementary
- ▶ Joseph W. Grier Academy
- ▶ Lebanon Road Elementary
- ▶ Merry Oaks International Academy
- ▶ Montclair Elementary
- ▶ Piney Grove Elementary
- ▶ Rama Road Elementary
- ▶ Renaissance West STEAM Academy
- ▶ Shamrock Gardens Elementary
- ▶ Smithfield Elementary
- ▶ Statesville Road Elementary
- ▶ Sterling Elementary
- ▶ University Park Creative Arts School
- ▶ Westerly Hills Academy
- ▶ Whitewater Academy

Improved Foundation in Math

98%

of 2018/19 Heart students met program growth goals on pre- and post-assessments aligned with NC End of Grade Tests. Goals were set with guidance from elementary math specialists at UNC Charlotte and CMS.

In the chart below, students develop mastery of foundational skills between the beginning and end of the year—signified in the progression from red to green below. On average, students demonstrated growth in 4.8 concepts in 2018/19.

% of Heart Students at Grade Level Target by Concept

	Counting	Changing Numbers	More/Less	Composition to 10	Decomp. to 10	Ten Frame Addition	Ten Frame Subtraction	Multi-Digit Addition	Multi-Digit Subtraction	Multiplic.	Division	Fluency (x)
Beginning of the Year - 2018-19												
1st Grade	21%	3%	2%	2%	11%	NA	NA	NA	NA	NA	NA	NA
2nd Grade	88%	19%	22%	9%	3%	1%	1%	0%	0%	NA	NA	NA
3rd Grade	99%	45%	40%	17%	8%	7%	4%	2%	0%	NA	NA	NA
4th Grade	NA	NA	NA	56%	25%	28%	19%	3%	1%	8%	4%	2%
5th Grade	NA	NA	NA	66%	37%	17%	12%	2%	0%	18%	7%	8%
End of the Year - 2018-19												
1st Grade	74%	36%	58%	34%	54%	NA	NA	NA	NA	NA	NA	NA
2nd Grade	98%	63%	79%	48%	34%	32%	33%	14%	9%	NA	NA	NA
3rd Grade	100%	83%	89%	70%	56%	55%	50%	20%	15%	NA	NA	NA
4th Grade	NA	NA	NA	87%	80%	87%	75%	36%	23%	43%	21%	17%
5th Grade	NA	NA	NA	91%	86%	89%	84%	36%	28%	45%	31%	39%

For example, at the beginning of 2018/19, only 17% of fifth graders in Heart's program were able to add and subtract within 20 efficiently, based on the Heart Tutoring pre-assessment. By the end of the year, after working with tutors, this number had grown to 89% of fifth graders mastering the skill!

Growth in Confidence and Enthusiasm

92%

of math teachers reported an increase in student confidence and/or enthusiasm toward math because of Heart Tutoring in 2018-19.

Teacher surveys reported student benefits including:

Increased participation in class discussions

Increased confidence after tutoring sessions

Increased understanding behind answers



“The long-term impact is their interest in learning more.”



Beyond the successful math lessons, the biggest reward for fifth year tutor Adam Schauer is seeing Heart Tutoring students develop a new curiosity in general learning.

“Obviously you want them to have an ability to grow through academics. But the longer-term impact – where you can really see the kids come out of their shell – is their interest in learning more. They bring an excitement to their tutoring session and they take that excitement home, to other studies, to telling their friends.”

Adam says the opportunity to mentor and positively impact children’s lives makes the experience rewarding. “Heart Tutoring’s playful approach to teaching math is a natural way to strengthen those mentor-mentee relationships,” he reflects. Children learn while connecting with their tutors because the lesson plans are easy to grasp and oriented around games.

“I find the biggest change in students is their overall confidence. They are excited to explain how they solve problems, and they could not adore their tutors more!”

-Diana Hiranman, First Grade Teacher at Shamrock Gardens Elementary

Student Success!

Sara* was a first year Heart student at one of HMT’s new partner schools, Rama Road Elementary. Alongside her two tutors, Eileen and Ann, she worked through three concept notebooks and successfully mastered all six skills that they covered. In the spring, her first grade teacher reported that she exceeded her projected growth by 17 points on a nationally normed math assessment (NWEA MAP)! This is one student success story of many illustrating the individual impact and learning facilitated by Heart Tutoring. *Name has been changed

PLANTING SEEDS FOR FUTURE IMPACT

“Grow the Good” - Five-Year Investment

Heart Tutoring was honored to be among 17 nonprofits selected to receive a significant five-year investment from Albemarle Foundation and Bank of America in September 2018! The two companies joined together to donate \$20,000,000 to Charlotte nonprofits that focus on at least one of three areas: early education, college and career readiness, and a stable family life. These areas were identified as factors of economic mobility.



Heart Tutoring will receive a combined \$1,250,000 from the two companies over five years to accelerate program impact and sustainability.

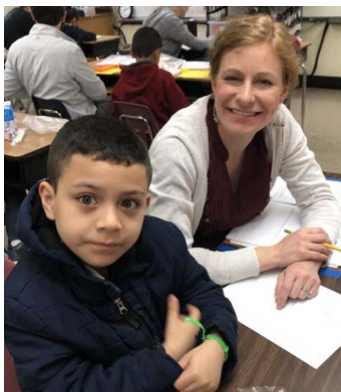
Albemarle Foundation and Bank of America will sponsor tutoring for ~200-250 students across 4-5 school sites per year for five years! Bank of America's gift aligns with the company's significant volunteer support, as over 80 Bank of America employees served as volunteer tutors with Heart Tutoring in the 2018/19 school year. Albemarle Corporation employees are also joining the effort as tutors.

The gift is tremendous validation of the impact Heart tutors and donors are making, and it is inspiring to an organization that is just six years old. We would not have been eligible for a grant of this magnitude without the significant investments our supporters have made and continue to make. Congratulations to all on this opportunity for expanded impact! With thousands of Charlotte students in need of extra support, we will move as quickly as possible to help.

“As we were considering where to invest, I heard from many people the positive difference that Heart Tutoring volunteers are making for students across the city. At Albemarle Foundation, we ‘Grow the Good’ and are excited to grow the great work you are doing, to ensure many more students get the help they need.”

-Sandra Holub, Executive Director, Albemarle Foundation

Testing the Soil in New Geographies



During FY19, a board subcommittee began exploring the question of whether Heart Math Tutoring's model could work in other cities. Heart Tutoring volunteer and Finance Committee member Silvia McKenna secured a pro bono project from her employer PwC to answer the question! Findings included strengths in the operations and processes behind Heart Tutoring's program. (Stay tuned.)

In addition to pro bono work, the collaborative relationship between PwC and Heart Math Tutoring continues to grow. Silvia, Director in the Private Company Services Practice at PwC, has tutored for four years with Heart Tutoring. She finds time to build the PwC tutor base of fellow employees that increased from three tutors in 2016/17 to 29 in 2018/19! PwC volunteers impacted 40 students across ten schools this past year.



“PwC recognizes the gap between those who have access to opportunity and those who don't. We are proud to support our employees who are taking steps towards closing that gap in Charlotte by helping students in high-need elementary schools build math skills and academic confidence.” *-Silvia McKenna, Director, Private Company Services, PwC*

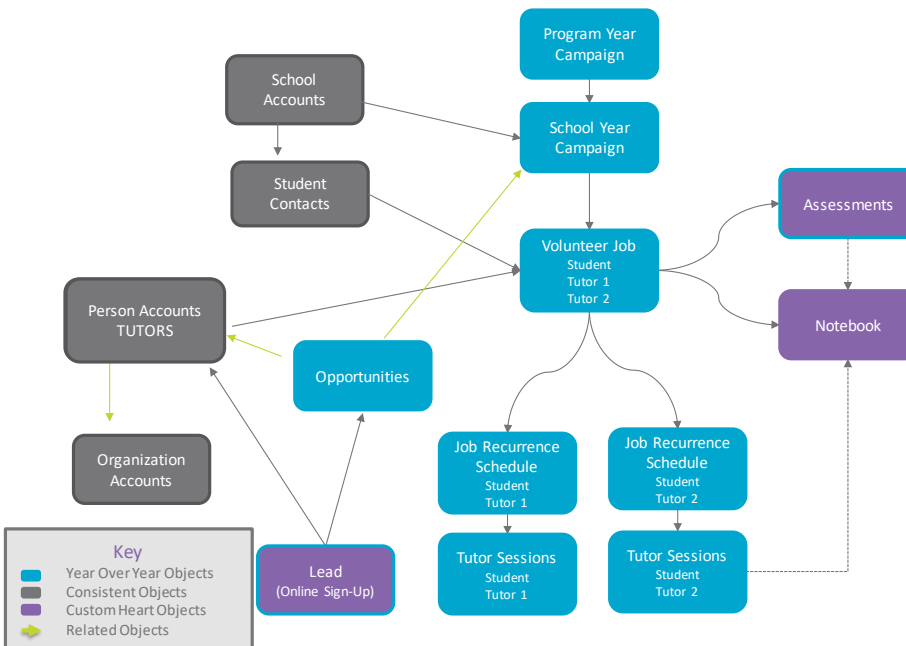
Strong Root System - New Database

Having grown from serving 105 to almost 1,000 students in six years, Heart Math Tutoring needed to create a scalable infrastructure for storing and using program data.

With generous support for the project from The Longleaf Fund, Skeebo Foundation, Apparo, and Accenture, Heart Tutoring staff members invested 450+ hours to build a student database that stores program-specific student and volunteer data. Completed in January 2019, the database helps Heart Tutoring identify the right students and serve them better by having multiple data points available at once.

Before the new database, staff used Excel spreadsheets to track program pre-assessment scores, tutor/student scheduling, ongoing formative assessments, attendance, post-assessments, and more. Over two years, staff worked with Accenture volunteers and then Torrent Consulting to map out use cases and replicate the Excel processes on the Salesforce platform through a blend of custom and configured objects (see below). Data includes student performance during program assessments and tutoring sessions.

HMT Database Structure

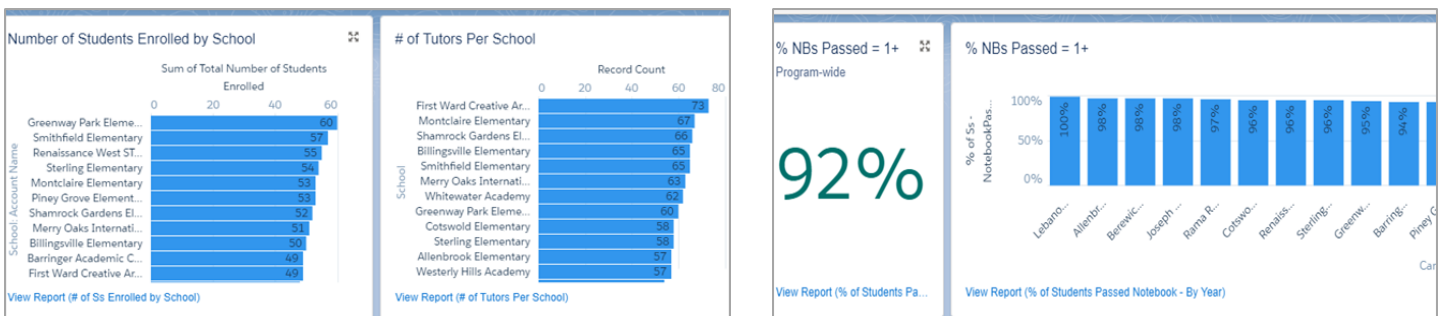


For the first time, staff can access multiple years of information on students in one place and easily view data across schools. Program Coordinators are able to leverage real-time and prior year data to support students during tutoring sessions.

Customized dashboards (see below) give the Program Team immediate access to dynamic information needed to serve students in the most powerful and efficient way.

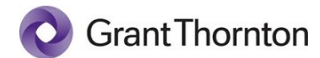
Heart Math Tutoring is able to turn their growing data into a growing asset!

HMT Dashboard Views



The project was supported by grants from The Longleaf Fund (\$50K), Skeebo Foundation (\$18K), Apparo and Accenture (\$10K and \$50K in pro bono support).

2018/19 VOLUNTEER PARTNERS*



Christ Church Charlotte
CHRIST EPISCOPAL CHURCH



MATTHEWS UNITED METHODIST



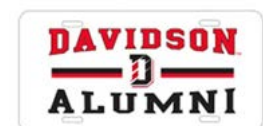
ST. STEPHEN
United Methodist Church



Cameron Wood Neighborhood

Smithfield PTA

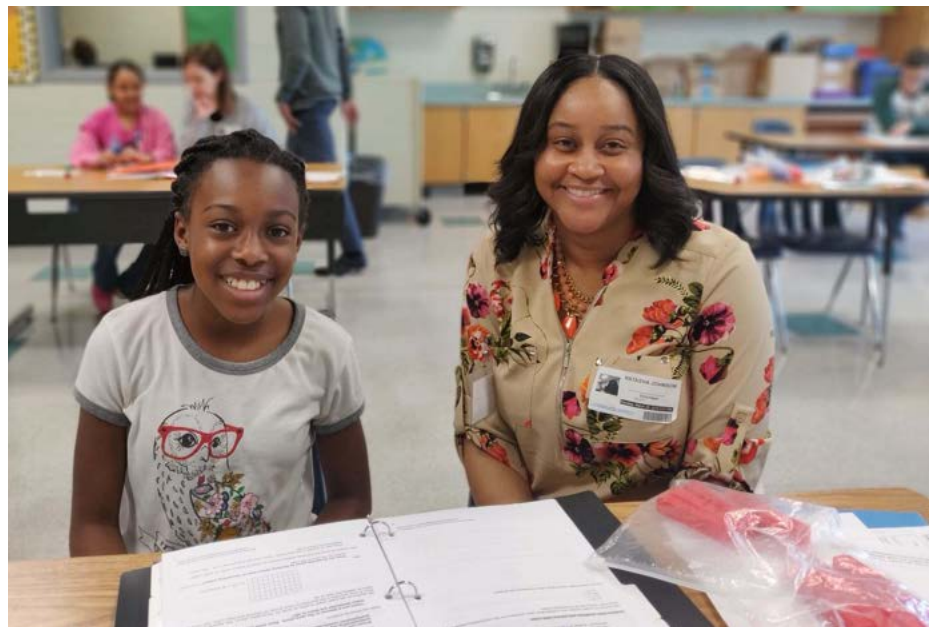
Park Crossing



Volunteer Spotlight

Natasha Johnson slips out of work for one hour each week to volunteer for Heart Tutoring. As soon as she arrives on-site to tutor, she is reminded of the importance of giving back and starts to relax.

As a first-year volunteer with Heart Tutoring, Natasha enjoys giving back. Volunteering allows her to connect with students personally by playing math games, which makes her more comfortable tutoring math. Natasha says she “assumed the curriculum would be very rigid, but it turned out to be quite the opposite.” She finds it to be well-organized, concise, easy to understand and most importantly – it’s fun!



Given the amount of growth that Charlotte is experiencing, Natasha believes that the need to serve others has become more important. While growth can present its own set of challenges, Natasha notes that “it’s necessary to lend a hand to help our community thrive.”

Volunteer Feedback

- ▶ **99%** rated the experience positive.¹
- ▶ **96%** would recommend the program to others.¹
- ▶ **94%** believe they had a positive influence.¹

“The impact you can make for such a small time commitment is incredible. It’s amazing how valuable a donation of your time is.”

*2018/19 Volunteer Tutor
at First Ward Creative Arts Academy*

Volunteer time is one of the only resources available to high-poverty public schools that hasn’t been fully leveraged,...yet.

But Heart tutors are changing that equation in Charlotte!

Thank you to each one of our 1,031 Heart tutors who together provided more than 17,000 hours of impactful, student-centered, community engagement with Heart students.

SUPPORTERS OF 2018/19 SCHOOLS

Financial support in FY18 from the donors listed below provided one-on-one tutoring for 995 students

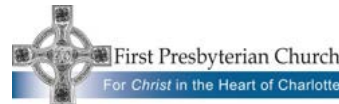
Lead Funders (\$100K+)



School Sponsors (\$30K+)



Funding Partners (\$10K+)



United Way of Central Carolinas



The James Family Foundation
Jenny Lillian Semans Koortbojian Trust

William C. and Norma C. Cannon Charitable Trust
Lucille P. and Edward C. Giles Foundation

Funding Partners (\$1K+)

American Century Investments Foundation

Birdseye Renewable Energy

BlackArch Partners

Christ Episcopal Church

First Presbyterian Church - *Presbyterian Women*

GEM Foundation

Junior League of Charlotte

Park Road Baptist Church

Synchrony Financial

Speedway Children's Charities

... across 22 schools in the 2018/19 school year. **Thank you to Heart's donors and funding partners!***

Class Sponsors (\$5K+)

Anonymous	Minna and Mike Elliott	Vickie and Gene Johnson	Susan and Don Sherrill
Amy and Robert Brinkley	Eric and Martha Eubank	Reid and Anne Leggett	Jake Thompson
Tom Bunn	Heather and Tom Finke	Wandra and George Mackie	
Lee Ann and Steve DeCarlo	Meredith and Kelly Graves		

Student Sponsors (\$1K+)

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Anonymous	Peter and Patricia Daniel	Mindy and Bob Jones	Carol and Martin Robinson
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Andy and Lee Cooney		Meredith and Geordie Pierson	

Donors (\$250+)

Mary and Jeff Abbood	Vivian Dorsel	Andre Hester	Caryn and Warren Overbey
Charlotte and Chris Atkinson	Thomas Duncan and Sheila Shaffer	Ben and Kathy Hill	Tom Park
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Robert and Sally Billington	Judy Emken	Virginia Horn	Ralph and Lynn Pitts
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Ed and Debbie Calcote	Alex Gajewski	Jeanne Kutrow	Ginny Shaw
Bowen and Lucy Caldwell	Melissa and Jeff Gass	Kathryn and Kevin Lilly	Sarah and Allen Shifflet
Carol and Milt Childress	Joe and Carol Gigler	Julie and Petri Lindberg	Meredith and Steven Shorkey
Andy Clark	Ruth Ellen and Thold Gill	Saundra Marion	Susan and John Siphers
Jean and Gene Cochrane	Alexandra Gregory	Margaret and Harrison Marshall	Sam Towne
Lisa and Peter Colaianni	Travis and Lise Hain	Abby and Kevin McClure	Keith and Lucy Trent
Daniel and Bonnie Collins	Denny and Kathy Hammack	Will and Missy Miller	Jo Van Dyke
Nancy and Charles Conner	Sarah Handler	DeAnn and Jeff Moser	Sue Walsh
Janis and Hunter Cook	Casey and David Head	Patti and Pender Murphy	Lisa and Dean Warren
David Cox	Logan and Jennifer Henderson	Leslie Murphy	Martha and Chip Whitfield
Donna and Al de Molina	Ryan Henderson	Anne and Clark Neilson	Christianna and Matt Williams
Andrew Dombrowski		Dave and Sue Ogden	

*A full list of supporters is available at hearttutoring.org/community-partners. Thank you to ALL of our supporters! 13

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).

2018-19 Board of Directors

Steve Beam
Beam Strategic Consulting

Barbara Bissell
NC Dept of Public Instruction (retired)

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Peter Daniel, Development Chair
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Michael Hutson
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Dominique Johnson, Secretary
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Anne Leggett
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Erin Lentz, Finance Chair
Grant Thornton

Ken Rogich
Latta Park Enterprises

Finance

This past school year, 58 individuals each sponsored a student with weekly tutoring (\$1,000), and 14 donors sponsored a class of 5 with tutoring (\$5,000+)! In addition to funding 27% of Heart Tutoring's total budget, individual supporters have made an impact on Heart students by advocating for corporate/foundation funding.

Thank you for your generosity to Charlotte students!

Heart Math Tutoring Expenses 2018/19 School Year	
<i>Revenue (Committed by 6/30/18)</i>	
Corporate/Foundations	\$798,582
Individuals	\$297,525
Partial Fee for Service	\$165,000
Total Revenue	\$1,261,108
Expenses	
Program	
Compensation	\$771,561
Tutoring curriculum/materials	\$49,137
Other program costs	\$31,040
Program Total	\$851,738
Admin/Development	
Compensation	\$202,051
Facilities/Equipment	\$59,864
Business expenses, software, etc	\$79,207
Materials/Office supplies	\$19,378
Admin/Development Total	\$360,500
Total Expenses	\$1,212,238
Cost per school	\$56,383

Heart Math Tutoring Cost Per School		
<i>50 - 60 students per school receive tutoring twice per week, Sept - May (Tier II Intervention)</i>		
<i>Per School Cost:</i>		
Site-based Costs	\$21,441	
Program Coordinator (PC) ¹		18-20 hr/wk, on-site support for tutors and teachers
Tutoring Materials and Supplies		Curriculum, tutoring materials, family events
Shared Costs	\$34,942	
Volunteer Recruitment and Support		Partnerships, targeted recruitment
Program Development, Evaluation		Data analysis & evaluation, curriculum development
Program Management		On-site in schools, PC training, Principal/CMS relations
Administrative, General, Fundraising		Rent, occupancy, HR, development
Approximate Cost per School	\$56,383	50 - 60 students receive 1:1 instruction 2x/wk Teachers gain math intervention capacity in classroom
Value of instructional hours provided	\$70,000	50 hours per week, \$50/hour, 7.5 months ²
Value / Cost - Instructional Hours	1.2x	
<small>¹Hourly, ten-month employee: Supervises tutoring sessions, Manages ~60 - 80 weekly tutors, Monitors progress of ~50 -60 students, Reports progress to teachers.</small>		
<small>²Assuming 50 students. The value of instructional time is ~\$70,000 depending on enrollment, not including other value the program brings to the school and teachers.</small>		

Financial support from FY19 will provide one-on-one tutoring for **1,150+ students across 23 schools** in the 2019/20 school year. **Thank you to Heart Tutoring's donors and funding partners!**

Lead Funders (\$100K+)



School Sponsors (\$30K+)



Lucille P. and Edward C. Giles Foundation

Funding Partners (\$10K+)



Charlotte Merchants Foundation

George W and Ruth R Baxter Foundation



Alpha and Omega Foundation



William C. and Norma C. Cannon Charitable Trust

The James Family Foundation

Individual Donors (\$5K+)

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Amy and Robert Brinkley
Tom Bunn

Lee Ann and Steve DeCarlo
Minna and Mike Elliott
Martha and Eric Eubank
Heather and Tom Finke

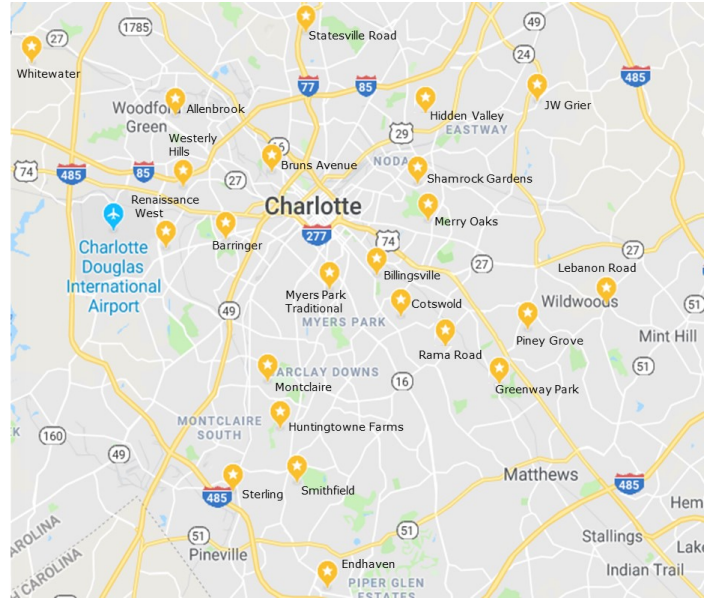
Vickie and Gene Johnson
Reid and Anne Leggett
Wandra and George Mackie
Lisa and Tom Phillips

Susan and Don Sherrill

THE COMMUNITY SUCCEEDS TOGETHER

Civic engagement is one of Heart Math Tutoring's five core values. We believe our community will rise to the challenge that thousands more students in Charlotte need a tutor's help. To volunteer, simply pick a tutoring time and location from the options at www.hearttutoring.org. Heart Tutoring provides training, volunteer-friendly lesson plans, and support from an on-site staff member (Program Coordinator) to ensure tutoring is impactful.

Visit www.hearttutoring.org for more information.



“Volunteering just 30 minutes per week... can have a lasting snowball effect on the long-term development of the children.”

Adam Schauer, fifth year Heart tutor

