

## **Concept Overview**

### **Redefining Summer: Leveraging Learning Outcomes to Combat the Achievement Gap**

Horizons National is an award-winning academic program offered on the campuses of independent school and college partners. Low-income public school students are challenged academically, socially and physically, including learning to swim, over nine summers with support throughout the school year. Over 2000 students from 308 public schools in 10 states attended Horizons programs in 2011. Horizons National is seeking partners to help: 1) expand our national network of Horizons programs; and 2) continue to lead the summer learning field with high-quality programming, results, and innovations.

#### **Problem**

The Achievement Gap is a national crisis. Low-income students enter kindergarten already behind and the gap grows every summer due to profound disparities of opportunity. Compared to their higher-income peers who make gains in reading skills, low-income students lose ground every summer, to almost a 3-year lag by 5<sup>th</sup> grade. Those who do not read at grade-level by 3<sup>rd</sup> grade are not likely to graduate from high school – not just a devastating loss of potential for each individual, but a critical threat to economic development and national security.<sup>1</sup>

#### **Solution**

From Kindergarten through 8<sup>th</sup> grade, Horizons' students show consistent gains in reading and math of 2-3 months over the 6-week summer program. Our proven hands-on approach instills the love of learning and academic and social skills essential to becoming responsible, contributing citizens by engaging students in academics, computer literacy, team athletics, cultural enrichment, special events and field trips. Swimming is an integral part of our strategy. Horizons is recognized as an exemplary quality summer learning program by The National Summer Learning Association, The Wallace Foundation, and the Campaign for Grade-Level Reading, and recognition in national venues and membership in *Wallace's More Time For Learning* leadership group lend Horizons a national voice.

#### **Affiliate Model**

The Horizons model employs local partnerships with independent schools and colleges to serve neighboring public school students in summers and throughout their school year. Horizons National houses expertise and raises national dollars for expansion, curriculum and program Initiatives and centralized services for the network of affiliates, while individual affiliates raise local dollars to fund their general operations. Initial seed funding totaling at least \$30,000 from the national office provides a bridge while the affiliate board and Executive Director build their local fundraising and partnership relationships. A mature (K-8) Horizons affiliate turns the \$30K initial investment into an eventual \$350,000 annual revenue stream. The affiliate model combines local control and influence with national resources and visibility well beyond the scope of a single, local program.

#### **Components**

With 24 sites in 10 states and growing, Horizons is a recognized national leader in the summer learning field and is well known for our high-quality programming and innovation in student assessment. Pursuant to our 2011 Business Plan, five-year goals are as follows:

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<sup>1</sup> Annie E Casey Foundation, Early Warning! Why Reading By the End of Third Grade Matters: A KIDS COUNT special report. 2010., p. 7.

- **Regional Expansion**
  - Regional priorities of New York City, San Francisco, Atlanta, Philadelphia, Newark
  - Other markets with interested host institutions and a local funding base
- **Leveraged Learning Initiative**
  - Built on already successful Literacy and STEM initiatives to improve program and student supports
  - Enable seamless communication between summer program and year-round schools to support student progress
- **Swimming**
  - Learning to swim is a key component of the Horizons student experience. Becoming a competent swimmer builds confidence and a desire to achieve.
  - Swimming is a life-saving skill that many low-income children fail to acquire, but it also is fun and quickly becomes a favorite activity.
- **Longitudinal Evaluation**
  - No definitive research exists on the effects of summer on long term learning.
  - Horizons students return for nine summers; thus Horizons is in a unique position to sponsor such research. A retrospective study is in progress, which will inform design of a coming multi-year evaluation.
- **Development of summer-specific assessment tools for industry use.**
  - No standards in summer assessments tools exist today.
  - Our data assessment partners, Wireless Generation and Renaissance Learning, to adapt their widely-used school year assessments into easily used summer to help providers have easy access to diagnostics and results, and pave the way to common standards.

**Five Year Overview**  
**Horizons National Network**  
*(excluding in-kind facilities donations)*



## Team

Horizons National builds on 50 years of experience in summer learning; we have been replicating our model over 15 years. Working with Wellspring Consulting and with support from The Wallace Foundation and the Coca-Cola Foundation, we have implemented a strategic expansion plan to further accelerate our growth and reinforce program quality. The senior management team combines a wealth of for-profit business, non-profit, education and market research experience that has resulted in Horizons position as an industry leader and innovator. Senior staff and Board of Directors listed separately.

## Results and Statistics 2011

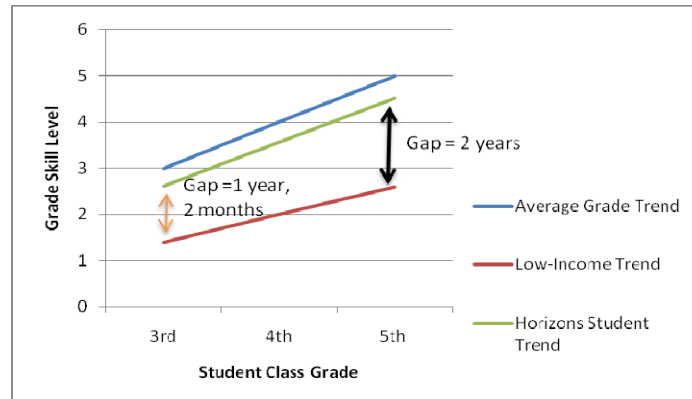
### Summer 2011 Statistics

After three summers of professional assessment and reading specialists working with every student, reading growth is remaining consistent at a very solid two to three months, which compared to typical summer learning loss of 2-3 months, implies our students are potentially up to 6 months better off each summer as a result of their attendance at Horizons. Summer 2011 marked the first organization-wide use of STAR math assessments, in conjunction with the roll out of STEM programming at every affiliate.

MEASUREMENT	Summer 2011	Summer 2010	Summer 2009
# Students (K-8)	2015	1833	1689
# Students (High School)	172	n.a.	n.a.
Student Ethnicity	African American 47% Hispanic 37% Caucasian 8% Other 8%	African American 50% Hispanic 33% Caucasian 8% Other 9%	African American 50% Hispanic 35% Caucasian 10% Other 5%
Program Sites	20	19	17
Cities	20	20	18
School Districts	22	22	20
Public Schools Served	308	309	261
States	10	10	9
Avg. Daily Attendance	94%	93%	93%
Avg. Days Attended	29	28	28
Year-to-Year Retention	84%	80%	80%
Summer Learning Gains			
STAR Reading (3-8 students avg)	2-3 months on average		
STAR Reading (3-8 students below grade avg beginning of summer)	2-4 months on average		
STAR Math (3-8 students avg)	2-3 months	n.a.	n.a.
STAR Math (3-8 students below grade avg beginning of summer)	3-4 months	n.a.	n.a.
mCLASS DIBELS (K-2 students)	1 risk level improvement on average		
Teachers (Head and Asst)	386	337	328
Teacher Ethnicity	African American 24% Hispanic 10% Caucasian 57% Other 9%	African American 25% Hispanic 12% Caucasian 58% Other 5%	n.a.
Staff Volunteers	310	266	255
Avg. Cost per student	\$2100	\$1937	\$1896
<i>Following are included above:</i>			
<i>Horizons grads employed</i>	66	66	60
<i>Horizons grads volunteering</i>	34	27	27

### Reading Assessment Growth over Multiple Years

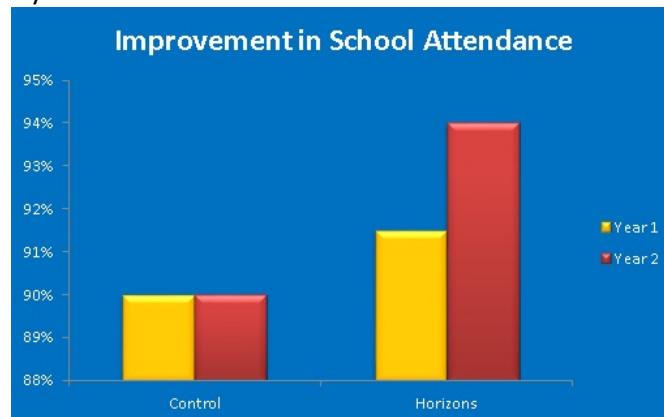
Horizons has partnered with two education data assessment firms, Wireless Generation and Renaissance Learning to generate useful and accurate pre and post reading and math assessments. Wireless Generation’s mClass DIBELS is used for grades K-2 reading assessment, and Renaissance Learning’s STAR Reading and Math are used for grades 3-8. The chart following compares three years of results from Horizons STAR Reading assessment to the trend suggested by research of the effects of summer vacation on achievement test scores.<sup>1</sup> It illustrates that although Horizons students continue to be slightly below grade level, their rate of learning is similar to expected grade progression and therefore prevents the achievement gap from growing each year.



### Early Evaluation Studies

Horizons was ahead of its time when, in 1981, Dr. Ed Zigler and his team from the Center in Child Development and Social Policy at Yale University conducted a study on the impact of the New Canaan Horizons program.<sup>2</sup> They found that Horizons students had improved attendance rates, more interest in nutrition, and fewer referrals to special services than the control group. In 1995, a second evaluation of the New Canaan Horizons program showed that Horizons:

- 1) Has a positive impact on students’ attitudes and learning
- 2) Positively effects attendance rates during the academic school year
- 3) Prevents the typical summer math decline, an advantage maintained during the school year
- 4) Increases the ability of students to tolerate frustration and to focus on academic tasks.



<sup>1</sup> Cooper, H., Nye, B., Charlton, K., Lindsay, J., & Greathouse, S. (1996). The effects of summer vacation on achievement test scores: A narrative and meta-analytic review. REVIEW OF EDUCATIONAL RESEARCH, 66(3), 227-268. EJ 596 384.

<sup>2</sup> "Evaluation of the Horizons Summer Enrichment Program", Raden, Marsland & Zigler, Yale University Department of Psychology and Bush Center in Child Development and Social Policy, December 1995.

## Leadership Team

### Management

**Lorna Smith, Chief Executive Officer** (A.B., Wellesley College; M.B.A. Cornell University) Ms. Smith has been with Horizons National for seven years. She has built Horizons National into a vital resource for the affiliates, creating a network with strong organizational identity, stability, and consistency. She has facilitated the opening of new program sites, and built a national presence for Horizons. Lorna brings market research expertise to the organization's critical evaluation practices.

**Jose Oromi, Vice-President, Operations** (B.A., University of Florida) Mr. Oromi oversees the affiliate support function at Horizons National, including helping new affiliates begin successful operations. He brings experience in global and domestic operations and programming, having worked with Save the Children and AmeriCorps, in addition to extensive teaching and community support services. Mr. Oromi was Executive Director of a highly successful Horizons affiliate for five years before joining the national staff.

**Andrew J. McLaren, Expansion Director** (B.A. Trinity College, Cambridge, UK; M.A. Teachers College, Columbia University) Mr. McLaren's role is to organize and lead the expansion efforts for Horizons National and to identify potential new affiliates. His experience as an independent school head for 31 years (most recently at Little Red Elisabeth Irwin School, NY), and after that as an executive of the New York State Association of Independent Schools for three years, leaves him with extensive and deep connections among heads of independent schools.

**Kim Fairey, Chief Advancement Officer** (A.B., Wellesley College; M.B.A., Stanford GSB; M.Div. Union Theological Seminary, NY) Ms. Fairey is responsible for national fundraising and marketing in support of the Horizons affiliate network. In her three years with Horizons, the national office supported the founding of seven new affiliate sites and successfully funded significant program innovations and affiliate support capacity. In addition to extensive professional and community fundraising experience, her career includes banking, management, strategic planning, and professional volunteer management.

### Board of Directors

**Mary R. Brock, Affiliate Committee Chair** *Co-owner WNBA Atlanta Dream. Board Member – The Manhattan Choral Ensemble, Winship Cancer Institute, Emory University, Dr. Pepper Museum and Free Enterprise Institute.*

**Joseph F. Chan** *Executive Vice-President of Business Development, Empire State Development Company. Member, Mayor Michael Bloomberg's Panel for Educational Policy in New York City*

**Karen L. Chaplin** *Urban League of Southern Connecticut – Board Secretary; former member Board of Education, Summit, NY and regional Board of Jack and Jill of America.*

**Eric L. Cochran, Secretary** *Partner - Skadden, Arps, Slate, Meagher & Flom, LLP, Board of Trustees - Williams College*

**Gary Cohen** *President and CEO - Timex Group. Board of Trustees - Temple Israel, Westport, CT*

**Amy Chan Downer** *Board member - Stamford Health System (Stamford Hospital); Executive Committee - Fund for Women and Girls*

**C. Brandon Downs** *Co-founder, Harbor Wealth Advisors. Treasurer, Horizons Atlanta.*

**Mary-Jo Gabel, Treasurer and Finance Committee Chair** *Finance Director, NeighborWorks Rochester*

**Anthony P. Grassi** *Former Partner and Head of Management Committee, C.S. First Boston. Board of Directors -TriPyramid, Inc. Trustee - Maine Chapter of The Nature Conservancy; Butler Fund for the Environment and the Butler Conservation Fund; Advisory Boards - land Trust Alliance and Americans for Campaign Reform; Trustee Emeritus -The Nature Conservancy, CT Chapter of TNC and an Honorary Trustee of the New Hampshire Chapter of TNC. Advisory Council of the New Canaan Country School.*

**Sally Grassi** *Camden, ME.*

**Paul O. Hirschbiel** *Owner and President - Eden Capital, LLC. Board member - Smart Beginnings South Hampton Roads, The Virginia Early Childhood Foundation, ChildFund International, The Norfolk Foundation, Horizons Hampton Roads, Eastern Virginia Medical School Foundation*

**Jill Iscol, Ed.D.** *President - Hummingbird Foundation. US-Afghan Women's Council member. Board member - City Year New York, Acumen Fund Vital Voices Global Partnership, Teachers College, Columbia University President's Advisory Council, Herbert F. Johnson Museum of Art, Cornell University, Advisory Board, New York State Commission on Community and National Service.*

**Carolyn Jeffrey** *Incoming Board Chair – Horizons at New Canaan Country School.*

**Brenda Jews** *Board Chair – Horizons Greater Washington. Board member - Arts Education in Maryland Schools Alliance, Stevenson University, and the Kennedy Krieger Institute.*

**Douglas M. Karp** *Managing Partner and Co-Chief Executive Officer -Tailwind Capital. Board member – City parks Foundation, Food by the Ton, New York City.*

**Monica Lamontagne, Vice-Chair** *Chair - Governance Committee. Board of Governors, Horizons New Canaan, and serves on board committees for Hole in the Wall and New York City Center*

**Leslie B. Littlejohn, Development Committee Chair** *- Board member – Taft School*

**Ned Mandel** *Development Director - Septima Clark Public Charter School. Board of Trustees, St. Patrick's Episcopal Day School in Washington, DC from 2001-2008*

**Lyn F. McNaught** *Founder - Horizons National. Board Member - Falmouth Education Foundation, Falmouth, MA*

**Duncan M. O'Brien, Jr.** *General Manager, Global Business Development - General Electric Company*

**Sarah Rosen** *Vice President for Development at Temple Sinai, Summit, NJ. Board member - Frances L. & Edwin L. Cummings Memorial Fund, Summit Area Public Foundation, Interweave, and the Duke New York Women's Forum. Member - Summit Mayor's Forum on Diversity.*

**Lindsay Ormsby** *Former Partner - Albert, Pastore & Ward. Program Committee - Fund for Women and Girls- Fairfield County Community Foundation*

**Charity Steinruck Ferreira** *Co-Executive Director – Horizons at St. Philip's Academy, Associate Director of Development, St. Philip's Academy, Newark, NJ.*

**James G. Rogers III, FAIA, Expansion Committee Chair** *James G Rogers Architects. Board of Trustees - Phillips Exeter Academy (retired 2007) and National Association of Independent Schools*

**Nicholas S. Thacher** *Head of School - Dedham Country Day School. Board of Trustees of Dublin School (Dublin, New Hampshire); Membership Committee of the Association of Independent Schools in New England*

**Jane Stoddard Williams, Chairperson** *Radio Host, Bloomberg EDU; Trustee, WNET TV New York*

## **Advisory Board**

**Christopher Babbs**, *Retired Head of School, Colorado Academy*

**Larry Berger**, *CEO and co-founder, Wireless Generation*

**Andrew M. Clarkson**, *Founder - Jeniam Foundation*

**Howard Greene**, *President and Founder- Howard Greene & Associates.*

**Evelyn K. Moore**, *Founder and former President of the National Black Child Development Institute*

**Katharine H. Welling**, *Board Member - Fairfield County Community Foundation*

**Edward Zigler, Ph.D.**, *Sterling Professor of Psychology, Emeritus, at Yale University and Director Emeritus of the Edward Zigler Center in Child Development and Social Policy*



## Foundation and Corporate Supporters

The Aetna Foundation  
The Coca-Cola Foundation  
Coca-Cola Refreshments, USA  
Dyson Foundation  
GE Foundation  
The Horace W. Goldsmith Foundation  
Jeniam Foundation  
Littlejohn Family Foundation  
Mylan Charitable Foundation  
Newman's Own Foundation

Pitney Bowes Literacy and Education Fund  
The William H. Pitt Foundation, Inc.  
John A. Sellon Charitable Residual Trust  
Silverleaf Foundation  
The Travelers Companies, Inc.  
Timex Group  
Rose and Sherle Wagner Foundation  
The Wallace Foundation  
Xerox Foundation

## Locations

### **Atlanta, GA**

*Holy Innocents' Episcopal School*

### **Brooklyn, NY**

*Brooklyn Friends School*

### **Chestertown, MD**

*Radcliffe Creek School*

### **Dedham, MA**

*Dedham Country Day School*

### **Denver, CO**

*Colorado Academy*

### **Greens Farms, CT**

*Greens Farms Academy*

### **Indianapolis, IN**

*St. Richard's School*

### **Hampton Roads, VA**

*Chesapeake Bay Academy*

*Norfolk Collegiate*

*Portsmouth Catholic Elementary School*

### **New Canaan, CT**

*New Canaan Country School*

### **Newark, NJ**

*St. Philip's Academy*

### **Rochester, NY**

*The Harley School*

*Warner School of Education, University of Rochester*

### **Rumson, NJ**

*Rumson Country Day School*

### **Salisbury, MD**

*Salisbury School*

### **Savannah, GA**

*Savannah Country Day School*

### **Greater Washington, DC**

*Maret School*

*St. Patrick's Episcopal School*

*Norwood School*

## Opening Summer of 2012

*Confirmed as of January 20, 2012*

### **Rochester, NY**

*Monroe Community College*

*Nazareth College*

### **Manhattan, NY**

*Saint David's School*

### **Bridgeport, CT**

*Sacred Heart University*



## **Redefining Summer: Leveraged Learning**

Many education reform discussions lack the focus on out-of-school time, particularly summer, required to close the achievement gap. Years of research confirm:

- 1) learning loss begins early and grows in the summer;
- 2) extending the regular school year will only keep students of lower-performing schools in that lower-performing environment longer; and
- 3) effective summer learning programs work best when they are offered in a new environment and provide enrichment opportunities.

Horizons is committed to continuous program improvement supported and guided by meaningful assessment, evaluation and outcome data. A two-year Literacy Initiative culminated in 2010, utilizing assessment and intervention tools from Wireless Generation and Renaissance Learning (national school data companies) and placing specialized staff at each program site. The Initiative paid for each affiliate to hire and train a Reading Specialist to implement assessments, analyze data, work with faculty to structure curriculum and lesson plans, and provide individualized instruction where necessary. This Initiative not only yielded improved student outcomes in reading (see Results page), but also increased consistency among all Horizons programs.

The Literacy Initiative also had a systemic effect on the Horizons network, establishing a stronger value proposition for affiliate membership in the national organization. The provision of a Reading Specialist for each affiliate ensured unified administration of assessments and consistent data collection at a scale no individual program could have achieved and it improved the level of reading instruction for each student.

Building on this success, Horizons began a STEM Initiative (Science, Technology, Engineering and Math) in the summer of 2010. Participating affiliates received funding for planning, project supplies, and a pre-/post- student assessment of math skills. STAR math results were substantially higher for the STEM programs than for the one site that was not part of the STEM pilot but did utilize the STAR Math test. We will incorporate STEM curricula at all Horizons affiliates in the summer of 2011 as part of an overall Leveraged Learning Initiative.

### **Leveraged Learning:**

Multiple summers of exposure to high quality instruction (supported by year-round activities) can have an exponential impact on student growth. We have the opportunity to carry on this important learning in literacy and STEM for the more than 2,000 low-income students we serve, and also to document methods and outcomes that can be shared with the summer learning field.

In the summer of 2011, Horizons launched a network-wide program initiative, Leveraged Learning. This initiative combined the most successful elements of the Literacy and STEM initiatives with a new position, Academic Coordinator, to leverage fundraising by the Executive Director, coordinate curriculum and fill a critical role in communication with students' parents, teachers, and year-round school. The Academic Coordinator worked full time around the summer session and will continue with limited hours during the school year. In the summer session, the Academic Coordinator:

- Functioned as program and site manager, freeing the Executive Director's time for development activities in the crucial summer session time;
- Worked with teachers to coordinate curriculum so that Literacy, STEM, and other vital elements of the Horizons model are delivered with consistent and rigorous quality.

Throughout the school year, the Academic Coordinator will facilitate and model communication with students' families and public schools to support year-round learning for students. The benefits of this role are significant.

- Ensure that Horizons teachers are aware of school-year issues and progress, and equally important, that school-year teachers are aware of, and adjust their expectations to, a student's progress in the summer
- Help parents can be effective advocates for their children;
- Support the collection of accurate and timely data for the Horizons database
- Contribute to a database of multiple year, comprehensive student data that Horizons, with its multiple-year commitment to students and families, can uniquely provide

At the end of three years, it is expected that affiliates will be able to cover the staff expenses, due to the increased fundraising focus the Executive Director will be able to maintain as a result of having the Academic Coordinator.

The combination of high quality data and better communication will institutionalize the sharing of student information and enhance instruction year-round. Horizons National is planning a formal longitudinal evaluation, to document the relationship between summer learning and school year progress to benefit summer learning and broader education reform.

## **Redefining Summer: Expansion for Impact and Scale**

Horizons National has been successfully replicating our program since 1995. The model is sustainable, and leverages a small national investment to produce an ongoing, self-funding Horizons program. In fact, since we began expansion, no program has failed. Horizons National has completed an updated business plan, calling for five new sites per year, for 45 total sites by the summer of 2016. The update stems from a 2010 study for accelerated growth and impact strategy by Wellspring Consulting. Since that study, Horizons has piloted several first university and college-based programs with great success. The previously untapped potential in the post-secondary school market adds significant opportunity for Horizons National's growth.

In recent years, successful Literacy and STEM initiatives have yielded consistent student gains of 2-3 months in reading and math (measured with assessment tools from Wireless Generation and Renaissance Learning). Strengthened affiliation agreements and a formal certification process ensure sustainability and program fidelity, while semi-annual conferences provide training and professional development for affiliate staff and board members. A new central database enables effective data collection and analysis at local and national levels. Expansion and affiliate support staff have been put in place this year, and national visibility is increasing. Horizons National is poised for successful growth.

While Horizons National will always continue to support single-site growth, we have now identified New York City, San Francisco, Atlanta, Philadelphia and Newark as regional expansion priorities.

We are actively seeking new host independent schools, colleges and regional expansion partners. The process of opening a new program usually requires local funding support to augment the seed funding from Horizons National and a champion from the prospect host school community to move the project forward. The person in this role works with Horizons National to cultivate support and spearhead a steering committee to conduct due diligence and planning.

**Sustainable Model:** Traditionally, each new site starts with one Kindergarten class and is increased by one grade each year until it is a fully mature K-8 program. This intentionally incremental growth, along with extremely high year-to-year retention of students and teachers, creates a very stable Horizons community of students, families, host school supporters, community leaders, and funders that has proven to be extraordinarily sustainable. Beginning with both a Kindergarten and fifth grade class is an option to double growth rate while still building the close community environment.

Development of the Horizons National network reflects this deliberate growth strategy. Originally created for the sole purpose of replication, central headquarters were needed for program support including evaluation, communication, marketing, PR and consulting services as the network matured. Currently the central Horizons National office serves affiliates in those functions, simultaneously identifying and developing new sites, and providing seed funding for their first two years of operations. Each affiliate establishes its own local board which, along with the local staff, is responsible for raising funds for the program. These fundraising activities tend to augment those of the host school and do not impair its own development efforts. Host schools contribute in-kind use of the campus and some business office services, but are not expected to contribute any direct funding to the Horizons program.

**Leveraged Investment:** The Horizons affiliate model is cost-efficient and maximizes return on investment. Horizons National provides seed funding of at least \$30,000 over two years to any new affiliate and dedicates staff time toward its opening and implementation. This amount may be higher in urban areas where real estate and costs are constrictive. The seed money serves as a funding bridge while new Horizons board and Executive Director establish the Horizons program in the community. By the third year, an affiliate achieves financial self-sufficiency and builds a perpetual stream of income for the organization as a whole. The host school's in-kind contributions make the cost per student low in relative to the very high quality of service provided.

The total investment of the central National office to establish a new affiliate site is about \$50,000, plus seed funding. At maturity, the original seed investment has established a long-term, self-funding program whose annual revenue raised are approximately ten times that investment. Below is an analysis assuming \$30K of seed funding and a mature annual operating budget of \$350K. The ten-year net present value of the revenue stream created by the \$80,000 investment is almost \$2MM, or 24 times that investment.

<b>Return on Horizons National Start-up Investment in new Affiliate (including seed funding) over 10 years</b>						
Year	Grades	Number of students	HN Investment	Local Revenue stream	Local In-kind (1/3 operating)	Net Return on Investment
0			\$17,000		\$5,000	\$0
1	K	15	\$37,000	\$20,000	\$5,000	-\$12,000
2	K-1	30	\$26,000	\$40,000	\$13,333	\$27,333
3	K-2	45		\$80,000	\$26,667	\$106,667
4	K-3	60		\$125,000	\$41,667	\$166,667
5	K-4	75		\$170,000	\$56,667	\$226,667
6	K-5	90		\$215,000	\$71,667	\$286,667
7	K-6	105		\$260,000	\$86,667	\$346,667
8	K-7	120		\$305,000	\$101,667	\$406,667
9	K-8	135		\$350,000	\$116,667	\$466,667
10	K-8	135		\$350,000	\$116,667	\$466,667
<b>Horizons National Total Start-up Investment (1)</b>			<b>\$80,000</b>	<b>Total Net Return on Investment</b>		<b>\$2,488,667</b>
<i>(1) Does not include funding Horizons National provides for network-wide curriculum, quality, and program enhancement initiatives after initial years.</i>						
<b>Net Present Value of Net Return on Investment at 3% annual rate</b>						<b>\$1,944,871</b>
<b>NPV divided by HN investment</b>						<b>24.31</b>

We are actively seeking new independent school and college host partners, champions and investors to help us establish new Horizons locations to reach more students. Horizons will continue to innovate and improve our award-winning program to graduate ninth graders who are competent, creative, confident and college-bound.

## ***Swimming at Horizons***

Learning to swim is a key component of the Horizons student experience. It not only addresses water safety issues, teaches skills for summer employment, and introduces a competitive sport, but also serves as an early opportunity for success, especially for the many students who come to Horizons fearful of the water. Becoming a competent swimmer makes better students as it builds self-esteem, resourcefulness, goal orientation, and contributes to sound judgment.

Swimming is essential from a safety perspective, especially for the low-income, typically minority students at Horizons. In the United States, drowning is the second leading cause of death for all children ages one to 14. The fatal drowning rate for African American children between five and 14 is over three times higher than for Caucasian children. In fact, nearly six out of 10 African American and Hispanic-Latino children are unable to swim – nearly twice as many as Caucasian children. Recent House Resolution #1446 recognized this epidemic and called for increased and wide availability of free swim lessons for minority children. USA Swimming, recognizing this imperative and also in a quest to bring minority swimmers into competitive swimming and diving, recently instituted their *Make-A-Splash* program to publicize and encourage more minority children to participate in swim programs.

Horizons has incorporated swimming since the first program began in 1964. Swimming in the hot summer is just plain fun, increasing students' engagement in and enthusiasm for Horizons – and is often cited first when young students are asked about their favorite part of Horizons. However, teachers noticed early that as students overcame their fear of the water they gained in confidence and self-respect that spilled over into classroom and life work. Swimming also:

- Encourages attention to detail and work toward a goal
- Teaches resilience and ways to overcome fears and obstacles
- Builds self-respect and self-confidence
- Introduces a competitive sport that may offer team and scholarship opportunities
- Teaches skills for summer employment

A few students, after learning to swim at Horizons, have gone on to enjoy college scholarships, employment and team membership because of the swim skills they learned at Horizons. We would like to identify ways to encourage those students forward, even as we maintain the clear focus on academic progress and swimming's adjunct role as a fun confidence and healthy lifestyle builder.

Swimming costs vary for each Horizons affiliate. The largest costs are pool rental time, high quality instruction and transportation. Some affiliates have a staffed pool at their host institution and only have to provide instruction. Others have to rent pool time and provide transportation to that pool for their students. On average, swimming at Horizons costs \$100 per student each summer for pool time, basic instruction, transportation and goggles, which adds over \$200,000 each summer to the Horizons network.

Horizons plans significant national expansion in the coming ten years. Dedicated expansion funding, nationally funded affiliate support initiatives and increased centralized resources are in place to ensure that Horizons outstanding quality remains in place and builds even as we expand. Swimming is a unique part of our model, but one that is a significant portion of affiliate annual operating budgets. There are

many ways to help ensure that current and future Horizons students continue to benefit from learning to swim. Following are examples of what your donation could help accomplish for our students.

- \$1,500 would fund swimming for a new Horizons class of 15
- \$2,000 would fund swimming and start-up for a new Horizons program
- \$5,000 would provide lifeguard training for a Horizons graduating class or transportation to an off-site pool for one summer
- \$10,000+ would begin a scholarship and equipment fund for Horizons students who would like to join a competitive swim team or take life guard training at licensing age
- \$20,000 would provide goggles for every Horizons student – a must for effective stroke training

We appreciate your interest in swimming at Horizons.

## Redefining Summer: Longitudinal Evaluation

It is well documented that summer learning loss is the major contributor to the achievement and even opportunity gap between children of low-income families and those from more affluent families, and that participation in a program like Horizons can have substantial positive impact for those students.

Whether such participation has lasting implications for future student achievement, or whether the impact of *multiple summers* of exposure to high quality instruction, supported by year-round activities, increases that positive impact is not so well documented. Most summer learning programs see their students for one, maybe two years and school districts have tended to invest in summer episodically and with emphasis on remedial, rather than holistic work. Thus, studies so far have been limited in their ability to track students consistently over multiple years.

Horizons commitment to students lasts at least from Kindergarten through the summer after 8<sup>th</sup> grade. Our teachers have seen transformative impact on student achievement and even their family's lives over the years. The combination of quality data and better communication generated by the Literacy and STEM Initiatives, and now Leveraged Learning and the Horizons National student database, means that Horizons uniquely has the consistent student data and communications systems to undertake meaningful, longitudinal research on the lasting implications of cumulative years of summer learning on student achievement and attitudes. Moreover, Horizons' organizational structure provides strong central resources combined with geographically diverse students and sufficient database for a broadly applicable and meaningful evaluation study.

### Two-Phase Longitudinal Evaluation

Metis Associates of New York has proposed an evaluation to be completed in two phases. Phase I will be a retrospective data investigation of a sample of Horizons students and a similar group of non-participating students identified through propensity score matching. This retrospective study is possible because Horizons already has *four years of summer data* for over 300 students. The pilot study can be completed in a relatively short timeframe, at a relatively small investment of \$125K, and will be a significant evidence-based study in new research.

Phase II, if warranted by the pilot, would be a more robust evaluation that would likely span five years prospectively. While specifications for Phase ii would be informed based on the results of the pilot study, the estimated cost is \$950K.

In addition to informing Horizons about its own program results, this study will be a significant contribution to informing education reform. While major foundations such as The Wallace Foundation and Annie E. Casey already have made significant investments in summer learning, education reform in general is still primarily focused on school-year and teacher development. This proposed study by Metis Associates has the potential to highlight the critical importance of quality summer learning to address our nation's crippling achievement and opportunity gap.



## Redefining Summer: Summer-Specific Assessment Tools Development

**Problem:** *Lack of standard and effective student assessment for programs that operate in the summer.*

The Wallace Foundation's recent analysis of barrier issues for summer-learning programs revealed "... a dearth of quality supports focused specifically on programs that operate in the summer... Work is needed to document the indicators of quality in summer programs and to design and entrench professional and programmatic standards and tools that fit the vision for quality summer-learning."<sup>1</sup>

The authors identified, "a critical need for a common MIS system and data sharing among public agencies and non-profits that operate summer programs." Noting that the literature provides clear and compelling evidence of summer learning loss **particularly for low-income children**,<sup>2</sup> they identified the need for "**better planning, infrastructure, data collection, and accountability**," to address summer-learning more fully as a school reform strategy.<sup>3</sup> (emphasis not added)

Accurate assessment is critical to:

- Help teachers use the short summer term most effectively with each student
- Document student progress for summer and school-year teachers and program funders.

Tests designed for school year are typically:

- time-consuming to administer
- not sensitive enough to measure growth over the short summer period
- difficult and time-consuming to adapt, analyze or aggregate.

Through discussion with other summer learning leaders, including the National Summer Learning Association, Horizons has affirmed that true summer-specific tools could improve the efficacy of summer programs throughout the nation. However, development and site-testing costs of such tools would likely be beyond the reach of any summer learning program. Furthermore, despite that fact that summer learning is critical to address the achievement gap crisis, the summer market is proportionately small compared to the school-year market in both size and ability of summer education entities to pay. This is underscored for programs serving low-income children in low-income neighborhoods where the greatest need for summer academic programs and the greatest potential impact exists. Therefore, private companies do not have market incentives to develop summer assessment products.

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<sup>1</sup> McLaughlin, B. & Pitcock, S. (September 2009). "Building Quality in Summer Learning Programs: Approaches and Recommendations." *The Wallace Foundation*.

<sup>2</sup> Cooper, H., Nye, B., Charlton K., Lindsay, J. & Greathouse, S. (1996). The Effects of Summer Vacation on Achievement Test Scores: a Narrative and Meta-Analytic Review. *Review of Educational Research*, 66, 227-268.

<sup>3</sup> Fairchild, R., Smink J. and Stewart, A.B. (September 2009). It's Time for Summer: an Analysis of Recent Policy and Funding Opportunities. *The Wallace Foundation*.

**Solution: *Summer-Specific Assessment Tools Development through a combination of private investment and philanthropic support***

Over the past several years, Horizons National has worked with Wireless Generation (WGen) and Renaissance Learning (RL) to use their school year assessment products in our summer programs.<sup>4</sup> This has provided much better information about students, and allowed for more targeted and individualized instruction, but still requires a great deal of effort and expense to manipulate the annual set-up, training, and administration of the school-year testing instruments for measuring summer growth. The reports and analysis require extensive, time-consuming and costly customization. However, average student growth in reading skills increased dramatically when Horizons used assessment data to inform choices in instruction. We believe that a summer-specific version of these tools could have an even greater impact on positive student academic outcomes, for Horizons and for other summer learning providers.

Horizons National and its proposed data partners are uniquely positioned to develop summer-specific tools which would make a significant contribution to the field of summer-learning by providing methods of capturing academic growth for a broad range of summer programs. The multiple benefits of summer-specific assessment tools will be shared with other providers in the field. It is with this vision in mind that Horizons National proposed an i3 validation grant to develop summer specific tools in conjunction with the other components of Leveraged Learning.

**Project:**

Wireless Generation and other data partners will develop the technology-based assessment tools and on-line training capabilities, working with Horizons students, teachers and national staff. The National Summer Learning Association (NSLA) will assist with development and dissemination of the products, and work with Horizons National to develop protocols and materials for outreach to school districts and summer programs. The project will be designed to meet the following parameters:

- The summer tools will tie seamlessly with the year-round products to provide meaningful comparison and longitudinal information;
- The tools will be useful, affordable, and made available to all summer learning providers;
- Online training modules will be tested and developed in conjunction with product development;
- Other summer learning providers will be identified by NSLA to serve as beta sites after initial year use at Horizons to ensure transferability
- Products will be disseminated both through manufacturer's existing customer pool and NSLA membership
- NSLA will run assessment training workshops for its members

WGen, recently acquired by NewsCorp, serves more than 200,000 educators and 3 million students. It is a leading national innovator in student assessment. NSLA is the only national non-profit devoted to helping programs, schools, districts, communities and states engage youth in high-quality summer learning.

**Budget:**

An initial budget was developed in conjunction with WGen and NSLA to meet the requirements of a federal i3 application. We would be pleased to refine and streamline the budget (applying lessons learned and without expenses associated with federal funding requirements) for an interested investor.

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<sup>4</sup> Horizons has piloted and used Renaissance Learning's STAR Reading, STAR Early Literacy, and STAR Math since 2006, and Wireless Generation's mCLASS DIBELS since 2008.