

## 2013-2014 Annual Report



"We cannot always build the future for our youth, but we can build our youth for the future."

-Franklin D. Roosevelt

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## **Our Vision**





150,000 Students Annually by 2020

Dear Friends,

We are proud to say that Junior Achievement of Arizona has completed its 57th successful year of educating our youth on entrepreneurship, financial literacy and work readiness! I would like to thank our incredible board of directors, donors, volunteers, educator partners and staff for **helping us reach 96,125 students last year.** 

With more than 1 million students in our K-12 education system, there is a tremendous need to prepare them for the future. We need to continue to advocate for the importance of teaching our future leaders about work and money. After all, education is about preparing a child to succeed in the real world, so they can find the best careers and make enough money to live their version of the American Dream.

We have served 1.5 million students since our founding and continue to play an important role in Arizona's workforce and economic development. Through our programs, Junior Achievement is an integral component to our college and career readiness conversation. Career-ready, financially savvy students become adults who will create and run a vibrant economy for their children and future generations.

**Our goal is to reach 150,000 kids annually by 2020.** Together, we can prepare young people to own their economic success, which benefits all of us for years to come.

Are you in? We invite you to join us on this critical mission.

With Gratitude,

Joyce Richards

President

Joseph Gelinas

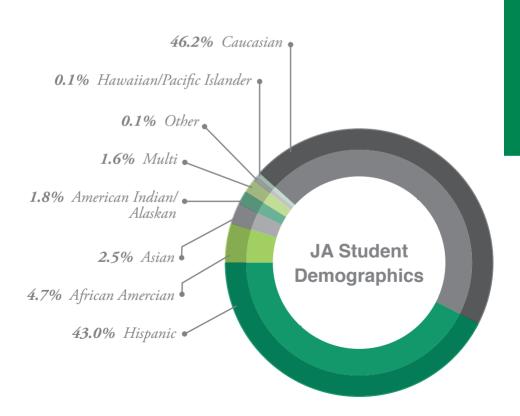
Retired SRP executive, State Board Chair

Joseph O. Selevos

## By the Numbers:

### JA students are:

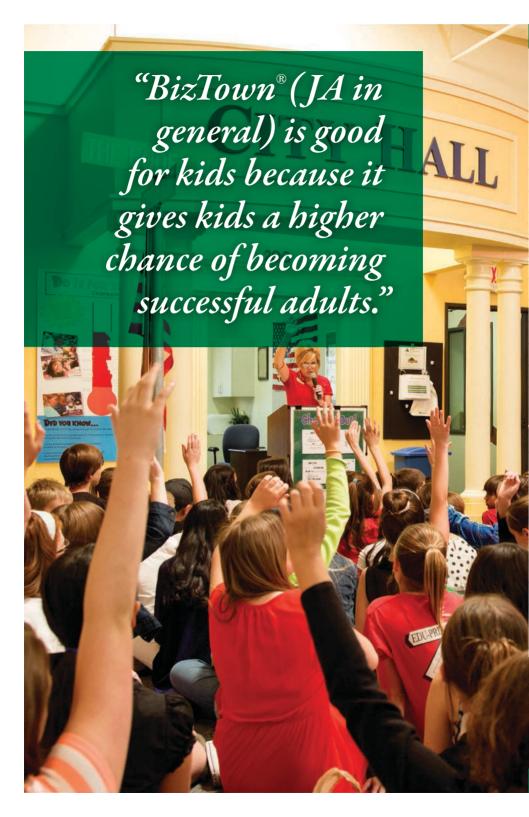
23% more likely to graduate high school 13% more likely to attend college



Percentage of JA students from **59** low-income backgrounds 96,125 Number of students reached Volunteers who taught students about 7,695 entrepreneurship, financial literacy and workforce readiness 3,691 Number of classes where JA was taught Teachers who supported our programs 3,384 in-school and/or through our experiential learning programs, JA BizTown® and JA Finance Park® 368 Partnerships with schools throughout Arizona

Board members who guided us to another amazing year

38 JA staff who made it happen



January 13, 2014

636 W. Southern Ave. Tempe, AZ 85282

Dear Phoenix Coyotes,

Thank you for donating to JA so we could prepare for the future. I had fon at Biztown and feel that I am prepared for the future. I may have to learn some new skills considering I won't start my job as a CEO. It can get somewhat stressful at your job, but in the end, it's all okay. I learned that at times you won't always meet your goal, but it's fine. I also learned that you don't always get things handed to you, you have to use your work ethic to earn it.

Biztown (JA in general) is good for hids because it gives hids a higher chance of becomina successful adults. They will comprehend what they heed to do and how to do it. Thank you once again.

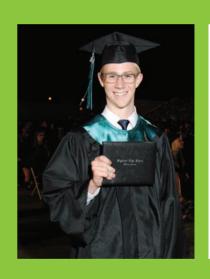
Sincerely, Ashlee

## Student Spotlight

Nicholas Welthy

JA You're Hired!

Alum



"Success manifests itself in the people that push toward a goal."

My name is Nicholas Welthy. I just recently graduated from Highland High School and will attend American University in the fall of 2014. I was introduced to Junior Achievement of Arizona at the beginning of my junior year through the JA You're Hired! and JA Economics programs. The JA You're Hired! Program was developed in Arizona and has three consecutive components that you can participate in. The first one is the classroom instruction component which matches experienced professionals who work in the business sector to participating classrooms to teach career related skills.

The second component is the JA You're Hired! Challenge. During this one day event, students from schools across Arizona compete in numerous workshops and competitions that teach them essential work readiness skills.

Lastly, out of the hundreds of students that participate only a few get chosen to compete for a space in the Professional Development Internship Program. Selected students have an opportunity to interview for the internships.

This organization has not only allowed me to acquire 3 internships, it taught me that success isn't brought about by how many friends you have or if you graduated last or first in your class. **Success manifests itself in the people that push toward a goal.** Life isn't about how much you get paid or how expensive your car is. It's about becoming the best version of you that you can be! And I will be forever grateful to JA for teaching me that!

Tempe Mayor Mark Mitchell *Talks JA* 



"The need to educate our youth about financial literacy and work readiness is at an all-time high."



To Whom It May Concern:

As Mayor of the City of Tempe, I want to reach out to you about two important issues concerning our youth today – financial literacy and work readiness – and an important organization right here in our community that is training the next generation workforce.

Today, students are growing up in a more globalized and complex economic climate than ever before and many do not have the skills necessary to compete for the best jobs or manage the economics of life. **The need to educate our youth about financial literacy and work readiness is at an all-time high.** 

That's where Junior Achievement of Arizona comes in.

Since 1957, Tempe-based Junior Achievement has been a key part of our community's economic and workforce development. The nonprofit organization teaches children – kindergarten through high school – about financial literacy, entrepreneurship and work readiness, so they learn how to connect what they learn in the classroom to what they could earn in the workforce. And, almost 60 percent of the kids Junior Achievement serves are from low-income backgrounds.

The agency teaches more than 95,000 students each year. In fact, my daughters went through Junior Achievement's BizTown, an experiential program that teaches fifth and sixth graders how to run businesses, manage employees and learn budgeting, and it was a great learning experience. It's one of the reasons that I can speak to the success of this organization.

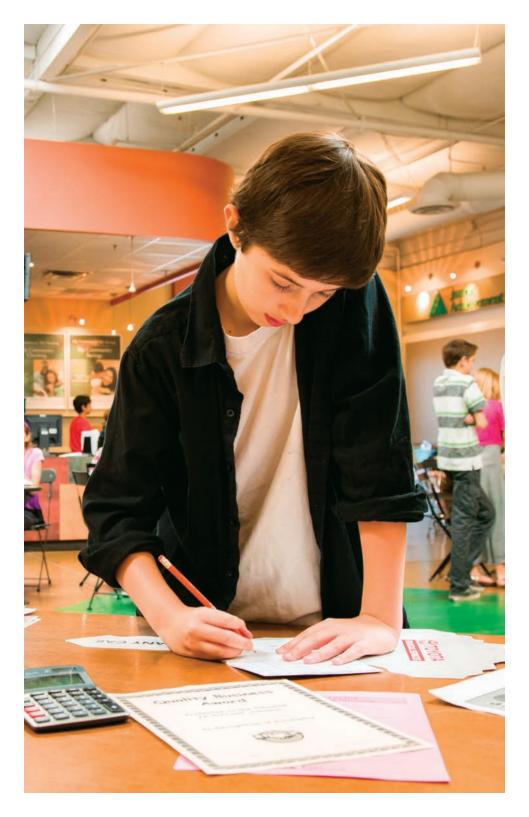
Junior Achievement of Arizona is the gold standard in financial literacy and work readiness education, and I encourage you to learn more about its programs and how to get involved.

Sincerely,

Mark W. Mitchell, Mayor

Mark W Witchell

City of Tempe



## **Financials**

Income	2012-2013	2013-2014
Contributions	\$1,960,519	\$1,877,552
Special Events	\$1,112,896	\$1,144,816
Annual Giving	\$3,073,415	\$3,022,368
Other Income  Gains/(Losses)	\$452,153	\$568,835
Income Related to Operations	\$3,525,568	\$3,591,203

Expenses	2012-2013	2013-2014
Program Services	\$2,256,629	\$2,424,196
Management and General	\$219,400	\$226,397
Development and Fundraising	\$1,040,567	\$1,205,554
Less Depreciation Primarily Related to Assets Built from Capital Campaign Funds	(\$230,195)	(\$194,878)
*Expenses Related to Operations	\$3,286,401	\$3,661,269
*Surplus (Deficit)	\$239,167	(\$70,066)

<sup>\*</sup>Excludes Depreciation

### **Our Funders and Partners**

### Gold Circle Society

Dee J. Balle
Todd H. and
Fran Langley
Elizabeth McNamee
Steven G. Mihaylo
George W. Podd
Sally S. Schindel
Georgia Takemoto

## *Gold Circle* (\$100,000+)

MassMutual Financial Group Arizona Coyotes Foundation Wells Fargo Bank

### *Free Enterprise Society* (\$99,999 - \$50,000)

Banner Medical Group
Charles Schwab Foundation /
Charles Schwab & Company, Inc.
Cox Communications, Inc.
DeVry Education Group
Papa John's
Trigon Executive Assessment Center

## *Cornerstone Society* (\$49,999 - \$35,000)

Allstate Insurance Foundation Bank of America Discover Financial Services GE Capital, Franchise Finance Sam's Club University of Phoenix

### *Directors Club* (\$34,999 - \$15,000)

Alliance Bank of Arizona
American Airlines
American Express
Bechtel Corporation
The Capital Group Companies
City of Chandler Neighborhood
Services
Comcast Cable
Crest Insurance Group
Fiesta Bowl Charities
Fry's Food Stores
GE Foundation
Nationwide Insurance Foundation/
Scottsdale Insurance Company
Kiewit Western Company
NextMed Holdings, LLC
Pima Medical Institute
State Farm Insurance
U.S. Bancorp
USAA
Vacation Internationale

## *Enterprise Club* (\$14,999 - \$10,000)

APS
Arizona Chapter NECA
Avnet, Inc.
BMO Harris Bank
BNI
Davison Benefits Group, Inc.
Greenberg Traurig, LLP
Impact of Southern Arizona
Norman P. and Teresa Klein
Microsoft Store
National Bank of Arizona
ON Semiconductor

### PricewaterhouseCoopers LLP

Rosendin Electric

Jack N. Rudel and Billie J. Harned

Ryley Carlock & Applewhite

Scottsdale Charros

Snell & Wilmer, LLP

SRP

Synchrony Financial Bank

TD Ameritrade

**Total Transit Foundation** 

Toyota Financial Services

Triton Technologies, Inc.

Tucson Electric Power Company

UA Local 469

Wholesale Floors. Inc.

Michael and Vicki Zaun

Zicarelli Foundation

## Presidents Roundtable (\$9,999 - \$5,000)

Accenture

Ace Cash Express, Inc.

Air Products & Chemicals, Inc.

American Reliable Insurance Company

AmTrust Bank

Arizona Cardinals Charities

The Arizona Diamondbacks Charities

Arizona Plumbing and Cooling

Contractors

The Arizona Republic

IMPA

B and S Electric Supply Company, Inc.

Bank of the West

Craig and Barbara Barrett

BBVA Compass

Bel-Aire Mechanical, Inc.

Bill Luke Chrysler Jeep Dodge

Blood Systems, Inc. and United

Blood Services

**BNSF** Foundation

The Boeing Company - Mesa

Employees' Community Fund

**Border States Electric Supply** 

Cannon & Wendt Electric Co., Inc.

Casino Del Sol

**CBRE** 

Citi

Climatec, Inc.

Crexendo, Inc

**Cummins Power South** 

Deloitte

**Delta Diversified** 

Desert Tree Farm

Dibble Engineering

**DP Electric** 

DPR Construction, Inc.

**Dynamic Systems** 

**Edward Jones Investments** 

Express Scripts, Inc. Foundation /

**Express Scripts** 

FedEx

Fluor Enterprises, Inc.

Fogo de Chao

Ford Motor Credit Company

Fort McDowell Yavapai Nation

**GEICO Insurance** 

Gila River Gaming Enterprises, Inc.

Robert Gillette

Go Daddy

Good News Radio Broadcasting, Inc.

Grand Canyon University

Graybar Electric

Henkel Consumer Goods, Inc.

Holder Construction Company

Honeywell

Honeywell Building Solutions

I.B.E.W. Local 640

**IBM** Corporation

IES Commercial, Inc.

### **Our Funders and Partners**

## Presidents Roundtable (continued)

**Insight Direct** 

Jennings, Strouss & Salmon, P.L.C.

Johnson Controls

**Jokake Construction Services** 

Joy Global Foundation, Inc.

JP Morgan Chase Bank

Kohl's

KSK Electric. Inc.

Herbert J. Louis

Jonas R. McCormick

Microsemi Corporation

MJS Designs, Inc.

The Phoenix Suns Charities

Piping Industry Progress & Education

Pizza Hut of Arizona. Inc.

Quicken Loans

**Resolute Commercial Services** 

The Rotary Club of Four Peaks

Sabre Airline Solutions

Huah K. Schillina

Carolvn L. Scott

Scottsdale 20-30 Foundation

Sedona Community Foundation

Steven G. Mihaylo Foundation

Sturgeon Electric Company, Inc.

Sunstate Equipment Corporation

Suntec Concrete

Trico Electric Cooperative

TruWest Credit Union

**Turner Construction Company** 

Verne C. Johnson Family Foundation

Walmart

Walters & Wolf Construction Specialties

Tim & Marcia Wepfe

xpeax

### Achievement Club

(\$4,999 - \$2,500)

A1 Communications

Arizona Community Foundation-

Herberger Endowment

Astra, Inc.

Bumgarner Family Foundation

Cash America/SuperPawn

Comerica Bank

Competitive Engineering Inc.

Richard and Karen L. Czack

Defero

Desert Schools Federal Credit Union

EDAP TMS

**EVO Scottsdale** 

Forever Living Products, Inc.

Foster Wheeler North America

Barbara J. Freemar

Harlem Globetrotters International Inc.

Intel Corporation

Intuit. Inc.

Jim Click Automotive and

**Banking Group** 

John Masters Organics

luah Jones

Kutak Rock LLP

Jim and Nancy Mackay

Norwegian Cruise Line

O'Rielly Chevrolet

PADT. Inc

Panda Key Realty

Parkway Properties, Inc.

Kerry F. Philipovitch

Pima Federal Credit Union

**PSCU** 

The Resort Group, Inc.

RML Electric, Inc.

Russell and Tammy Burns

Ryan Companies US, Inc.
Siemens Building Technologies, Inc.
Signature Technology Group, Inc.
Southland Industries
Sterling InfoSystems
Superstition Mountain Golf and
Country Club
Gary L. and Victoria Tiepelman
Troon North Golf Club
Tucson Medical Center
Tucson Tamale Company
Universal Avionics Systems
UPS
Vantage West Credit Union
Willmeng Construction

Yavapai County Community Foundation

### *Entrepreneur* (\$2,499 - \$1,000)

Zak Controls, Inc.

Able Steel Fabricators
Accutron, Inc.
Adolfson & Peterson Construction
AGM Container Controls
Airpark Signs & Graphics
Airtronics, Inc.
Alliance Beverage Distributing Co.
Sam Alpert
ameriSOURCE
Apex Electrical Sales
Arizona Coin Exchange
Alan R. and Charlene Augenstein
Byron Baker
Bay State Milling Company
BeachFleischman PC
Best Buy

Blue Cross® Blue Shield® of Arizona

Border Construction Specialties, LLC Jon D. Brinton and Loraine Carlson-**CAID Industries** Edward and Bonnie Capasso Casey and Dawn Cartier CBIZ Financial Solutions, Inc. Chandler Horizon Rotary Club Colonial General Insurance Contractors West Inc. Crest Steel Cupertino Electric, Inc. Cushman & Wakefield, Inc. Leo J. and Joy Dembinski Donald L. Dodgen Drinique, LLC **Element Payment Services** Enterprise Rent-A-Car Enterprise Technology Services, LLC Fairmont Scottsdale Princess John Michael and Patricia A. Feeney First Credit Union First Western Trust Bank FirstBank of Arizona Michael I. and Suann Fleming Fountain Hills Rotary Club Freeport McMoRan, Inc. Gammage & Burnham. PLC Joseph A. and Pat Gelinas Rhonda Gibler Tyrone F. and Lisa Graham

### **Our Funders and Partners**

### Entrepreneur (continued)

Brad W. Harper Howard P. Nute

Hunt Construction Group, Inc.

Integrated Axis, LLC

J & S Aviation

Jennings, Haug & Cunningham, LLP

John F. Long Foundation

Todd S. Jones

William J. and Elizabeth Keilen

Limon-Wynn Law, PLLC

Live Nation

Maguire & Pearce

Manpower

Frank P. Marino

Mario E. Diaz & Associates

Mehdi K. Mazaheri

McCormick Ranch Golf Club

McKinsey & Company

MedSolutions, Inc.

Microchip Technology, Inc.

Modern Industries

David E. Morgan

Monkey Depot, LLC

Matthew Mooney

Northwestern Mutual

Stacy Norton

Orbital Sciences Corporation

Penny Pincher Auto Parts

Rosemary M. Perez

Pinto Valley Mining Corporation

Pointe Hilton Squaw Peak Resort

Port of Subs

**Priority Financial Group** 

Protiviti. Inc.

Re-Create Companies

Jovce A. Richards

William Rinehart

The Ritz-Carlton, Golf Club

Rush Truck Center Tucson

Safeway Stores, Inc. Foundation

Theodore Sangalis

Schneider Electric/Square D

Steven L. and Pamela Seiler

Shadow Mountain Mini-Storage

Sheraton Phoenix Downtown

Cary W. and Regina Smith

Travis G. and Taria Smith

Mary Jean Snel

Southwest Gas Corporation

SSCE Holdings

Lori Stangl

Michael Suba

**Target Commercial Interiors** 

TCI Wealth Advisors, Inc.

Team Fishel

Art R. and Paula Tellez

Thomas Title & Escrow

Matthew Thorne

Trans-West Network Solutions

triple 3 consulting

Troutslaver LLC

Tucson Federal Credit Union

Tucson Police Department

Jeff Ungerman

United Airlines Fantasy Flight

University Mechanical & Engineering

Contractors, Inc.

Vantage Retirement Plans, LLC

Alan S. and Jayne Wessel

Western Container Corporation

Winston & Strawn



## State Board of District and Foundation Trustees 2013-2014

#### State Board Members

Leo Dembinski

**Daniel McAuliffe** 

Foundation Trustees

Joseph Gelinas
Chair/Secretary

President

Leo Dembinski

Treasurer

Treasurer

Wardell 'Buck' Brown

**Joyce Richards** 

Jeremiah Foster

Secretary

Valerie Iwinski

Alan Augenstein

William Keilen

Michael Marrie

Norman Klein

Peter Rathwell

Steven Seiler

**Jack Rudel** 

Marcia Wepfer

**Marcia Wepfer** 

**Alan Augenstein** 

# "An investment in knowledge pays the best interest."

## Central District Board of Directors 2013-2014

#### Executive Committee

**Jeremiah Foster** 

Resolute Commercial Services

Chair

Karen Czack

American Express

Chair Elect

Treasurer/Chair, Finance

Valerie Iwinski

OneRoof Energy

Immediate Past Chair

**Gary Tiepelman** 

Scottsdale Insurance Company *Secretary* 

Leo Dembinski

High Performance Edge

**lain Hamp** 

Wells Fargo Bank

**Brad Harper** 

Trigon Executive
Assessment Center

**Craig Jacob** 

DeVry University

Kevin B. Kinerk

Thomas Title

Jay Nalli

Triton Technologies

**Peter Rathwell** 

Snell & Wilmer

**Jack Rudel** 

Jennings, Strouss & Salmon

**Marcia Wepfer** 

Wells Fargo Bank

## Central District Board of Directors 2013-2014

#### **Board Members**

**David Bishop** 

American Traffic Solutions

**David Bruno** 

DHR International

Joseph Bleyle

Enterprise Bank

**Edward Capasso** 

Henkel Consumer Goods, Inc.

Wendy Carlos

AmTrust Bank

**Casey Cartier** 

Jokake Construction Services Inc.

Sean Claypool

Charles Schwab & Company

Matthew Coughlin

BMO Harris Bank

Michael Czerneda

Saddleback Communications

**Monique Erickson** 

Fry's Food Stores

Michael L. Farmer

JPMorgan Chase

David Fitzgerald

University of Phoenix

Michael Fleming

Pricewaterhouse Coopers, LLP

**Karl Freeburg** 

Greenberg Traurig LLP

Tyrone Graham

GE Capital, Franchise Finance

**Scott Hanson** 

**HMA Public Relations** 

**Todd Harkins** 

Sam's Club

W. Scott Jenkins

Ryley Carlock & Applewhite

**Hugh Jones** 

Regis Registration Systems, LLC

**Charles Lala** 

Allstate Insurance Company

Jay Layton

Cobb Mechanical

Kenneth Lee SRP

OFT

Frank Lyall
Cox Communications

Jonas McCormick

Deloitte

Fred Meeske

Rosendin Electric

**Susan Menchaca**MidFirst Private Bank

**Robert Paine** 

Consultant

**Tony Parisi** 

Johnson Controls, Inc.

Karen Quick

Accenture

**Jeffrey Schelter** 

Alliance Bank

Cary Smith

USAA

Travis Smith

Moss Adams LLP

**Art Tellez** 

Charles Schwab & Company, Inc.

Cmdr. Louis Tovar

Phoenix Police Dept.

Tracy Turner
Holder Construction

Judie Verb

U.S. Bank

Michael Vilello
Toyota Financial Services

Lalit Wadhwa

**AVNET** 

Alan Wessel

APS

**David Woell** 

Bank of America

Michael Zaun

Edward Jones

## Southern District Board of Directors 2013-2014

#### Executive Committee

Wardell 'Buck' Brown

U.S. Bank

**Patricia Feeney** 

JPMorgan Chase Bank, NA Christopher Gleason

NextMed Holdings, LLC

#### **Board Members**

Eliezer 'Elie'

Asunsolo

BBVA Compass Bank

**Andrew Bess** 

The University of Arizona Health Network

Russell Burns

Agape Hospice and Pallative Care

R. D. Castillo

Mastek-InnerStep, Inc.

Stephanie Chavez

Vantage West Credit

**Uday Dalvi** 

DataWorks

**Bret Foudray** 

O'Rielly Chevrolet

Stephanie Gillmore

Wells Fargo

**Scott Hallett** 

NextMed

De neiva Knight

Comcast

**Chrisie Koury** 

BNI

Paloma Lopez-

Santiago

Strongpoint Media

**Frank Marino** 

UNS Energy Corp./

**Todd Martin** 

Tucson Tama Company

Jason Robinson

Northwestern Mutua

**Matthew Rosen** 

Burk, Hall & Co.

Kim Seyller

Clear Channel Radio

Jeremy Thompson

Cov Communications

**Guy Welsh** 

Now York Life

"Nothing will work unless you do."

## **Fundraising Events**







### JA Stock Market Challenge and Student Stock Market Challenge: October 30 & 31, 2014

Two months of stock trading are condensed into one exciting evening. Teams are issued \$500,000 of mock stock in fictitious companies and then compete to create the highest net worth.

### JA Open 4 Business Golf Tournament:

### December 12, 2014 (Central Arizona) | May 2015 (Southern Arizona)

Enjoy complimentary breakfast, on-course lunch, champagne, cigars, cocktails all day, buffet reception, contests, entertainment, raffles, live and silent auctions, and amazing tee prizes.

#### JA You're Hired! Challenge: April 2, 2015

A powerful career readiness program designed to prepare high school students for a one-day Workplace Skills Challenge where they will put their newfound skills to the test.

### Women's Golf Classic: April 20, 2015

Tailored for professional businesswomen, this fun-filled day includes complimentary breakfast, lunch, champagne, massages, cocktails, buffet, contests, raffle, and fantastic live and silent auctions.

### Golfer's Dream Day: May 15, 2015

This "All You Can Play" golf tournament is for the fanatical golfer who enjoys spending an entire day on the course.

#### Bowl-A-Thon: Year-Round

The Bowl-A-Thon is a fun and exciting team-building opportunity for participants. Enjoy two hours of bowling, music, food and a chance to win cash and prizes.

## **Our Programs**







#### K-12 Curriculum

With a focus on financial literacy, entrepreneurship and work readiness, Junior Achievement's classroom curriculum complements what our hard-working educators are already doing to prepare our young people to succeed in the future, both personally and professionally.

We partner with more than 3,200 adult volunteers from the public, private and non-profit sectors who teach our curriculum free-of-charge in the classroom, kindergarten through high school.

#### IA BizTown®

JA BizTown is an engaging, hands-on program introducing fourth, fifth and sixth graders to economic concepts, workplace skills and personal and business finances in a student-sized town built just for them.

Starting with 14 hours of classroom instruction, students create a business plan, calculate operating costs, explore career options and design a marketing campaign. Then they implement these new skills at JA BizTown—two 12,000-square-footcombined learning environments—where they work for four and a half hours.

### JA Finance Park®

Our JA Finance Park program invests in youth now so they can navigate the financial waters in the future. An experiential, real-life simulation, JA Finance Park first provides 14 in-school lessons to middle and high school students where they learn about interest rates, retirement planning, balancing a family budget, how education affects their long term earnings potential and how saving today can affect their future.

### **Partner With Us**

### We offer many ways to get involved with JA:

- Volunteer in-classroom, at JA BizTown® or JA Finance Park®, or on a special events committee
- Sponsor a JA BizTown shop
- Adopt a class, grade or entire school of students
- Sponsor an event
- Donate your knowledge and skillset
- Join our board (C-level executives)

### Based on the customized partnership, we offer ROI through:

- Inclusion in communications to more than 20,000+ people in our database
- Signage at events and/or our Tempe offices
- Visibility in the classroom
- Invitation to exclusive networking events such as the JA You're
   Hired! Challenge and annual open house
- Recognition on social media
- Joint press release or media alert
- Inclusion in materials, website and/or annual report
- Opportunities for cause-marketing campaigns

