**Junior Achievement of Arizona**

**2020/21 Key Accomplishments**

**Students Served = 64,063**

 **K-12 Classroom = 39,052 (includes 2,500 JA Inspire)**

 **SAZ = 9,060**

 **CAZ = 29,992**

 **Outside of Classroom (Website, Backpacks, Youth Centers) = 16,043**

 **JA BizTown & JA Finance Park = 8,968**

**Programmatic Volunteers = 1630** (929 community vols + 219 teacher-led + 482 K-12 = 1630)

**Financials**

 **Net Surplus = $1.5 million (includes $471K ERC and $423K PPP)**

**Staff Satisfaction = 96%**

**Overall**

Junior Achievement of Arizona exceeded all expectations during an extremely difficult year.

* **Programs**: JAAZ went from serving over 80,000 students with only in-person programs, to serving zero students in person and over 60,000 students virtually. JAAZ redesigned all of its programs and created new virtual programs that were incredibly successful. One of the new programs is JA Inspire which is generating excitement in the education and business communities. Numerous influential organizations want to partner with JAAZ because of this new program which is rapidly becoming the premier career exploration and readiness program in the state.
* **Financials**: The fundraising environment was very challenging with donations from corporations and foundations decreasing by 50%. JAAZ increased donations from individuals, converted the special events into virtual events, and found creative ways to raise money. JAAZ staff sought out governmental COVID relief funding and received about $900K from PPP and ERC. JAAZ reduced expenses through pay cuts for the Leadership team and other cost containment efforts.
* **Culture**: Staffing reductions from July 2020 and the increased uncertainties and pressures of this year put a huge burden on staff. JAAZ Leadership staff focused on keeping staff engaged with increased communication and remote activities throughout the year. Staff satisfaction of 96% is an all-time high. Staff feel valued and connected.

**Accounting**

* Clean audit opinion
* Submitted 990 timely
* PPP1 loan forgiven $423,684 & PPP2 loan obtained, $405,029
* Employee Retention Credit (ERC) submitted to IRS for a total of $471,131
* Request for proposals for banking and investments – new relationships established
* Request for proposals for audit – new contract, continuing with CliftonLarsonAllen for 3-5 years.
* Overhead rate 29.95%; including the value of volunteer time shows an overhead rate of under 19.3%
* Monthly financials available for the boards and the grant submissions
* Budget ready in a timely manner
* Five-year economic model created
* Maintained Guidestar Platinum Award demonstrating our commitment to transparency
* Maintained three-Star Charity Navigator Rating (100% on Accountability Transparency; 85.33% on Financials due to overhead costs and fundraising efficiency)

**Human Resources, IT**

* Maintained high staff survey results during year of COVID:
	+ No “red” (less than 80% approval) for entire fiscal year
	+ 100% completion rate for 6/2021
	+ 6/2021 only 1 question below 90%- training at 88%
	+ Multiple questions with100% approvals
* Maintained 3-tiered medical plan with JA paying 94% employee premium and 10% dependent premium
* Maintained work from home for staff with work from office when needed/desired
* Transparently communicated and managed furloughs and pay decreases while maintaining staff satisfaction
* Remodeled the lobby for modern, warm and welcoming entry
* Reconfigured some of office space for more open areas in particular upon entry
* Threw a very successful virtual holiday party
* Maintained staff wellness checks through regular one on one check ins
* Liz won JA USA MVP award (highest national award given)
* Liz joined the JA USA JEDI Network Council (formerly JA USA Multicultural Business Resource Group) – Justice. Equity. Diversity. Inclusion.
* JAAZ created a DEI statement document – including commitments for creating more diversity amongst staff and vendors
* Established a monthly voluntary DEI lunch discussion group to build awareness and create better allies
* Maintained and encouraged tech for remote options, including webcams for the office

**Facilities**

* Remodeled JA BizTown 1 by stretching grant dollars and obtaining donated services
* Remodeled Lobby at no cost to JAAZ

**Marketing/Brand**

* Exceeded all goals for marketing – which were daunting and ambitious!
* Grew social engagement significantly which was a win, given it was our primary way to connect during this virtual year. Kudos to Carina for taking the challenge and running!
* Added 7,292 people to our email list this year, despite not being in person
* Implemented robust digital advertising, new email platform and much more sophisticated marketing tactics
* Secured free PR help (thank to Goodwill!) and already having huge impact for JA brand
* Created an informal marketing committee of experts outside JA to speak into what we’re doing to engage our audiences

**Positioning/Strategic Partnerships**

* Formalized a strategic partnership with Pipeline AZ to make a bigger impact on JA students AND to better position JA as an expert and solution in career-readiness education for HS and MS students
* Finalizing strategic partnerships with Center for Future of Arizona and Arizona Business & Education Coalition to further bolster our brand position and programming as premier, top-tier education for students
* Established relationships with key individuals in Arizona Department of Education and the Governor’s office, as well as various other policy groups
* Established relationships with key groups in County Superintendent offices, Maricopa County workforce, ASU, Maricopa Community Colleges, Arizona@Work, etc.

**Special Events**

* Transitioned the Stock Market Challenge and Student Stock Market Challenge to fully virtual experiences, moving from a Phoenix-Metro based event to a statewide event.
	+ Raised $175k statewide, while lowering all expenses.
	+ Increased number of students served as well as increasing the reach to areas of the state previously unable to attend the in-person event.
	+ Helped to develop the standard of the virtual experience to help other JA areas to host successful similar events.
* Helped to turn the JA You’re Hired event into a now year-long career exploration virtual experience for students, JA Inspire
* Transitioned the 401k Race for Financial Fitness to a 2-week virtual fundraiser with over 150 participants and raising over $80,000
* Two successful JAO tournaments in December and May, raising the most money ever
* Implemented online fundraisers for additional revenue
* Kept all the event committees engaged and motivated during the challenging Covid times, even when the events were postponed of canceled; delegated more logistics and fundraising responsibilities to the event committees
* Special Events raised $1,014,500 which was above the Statewide budget of $850,000

**Development**

* Raised $3.1MM - $600,000 more than our budgeted philanthropic goal ($2.5MM)
* Best Individual Giving year ever – Approximately $485K raised statewide
* Two Six-Figure Gifts Secured - $201K from Piper and $180K from JRI Management (Chompie’s & Freddys)
* Statewide Development team aligned – everyone on portfolios and good progress on fundraising approach

**Education**

* K-12 overcame no-in person volunteering restriction by creating engaging K-8 PowerPoint versions of the JA kit curriculum that allowed JA volunteers to teach live by beaming in virtually; student knowledge gain registered an impressive 38%!
* JA BizTown team assisted with new town redesign and worked diligently to reconfigure both towns to meet COVID-19 requirements to ensure a smooth relaunch of the town during the 21/22 school year.
* Successfully launched two new JA USA 100% virtual programs (JA Adventures and JA Finance Park) to reach students during town closure; served 11,079 virtual students exceeding goal by 85%.
* Newly implemented experiential JABT (25.3% gain) and JAFP Virtual (36% gain) programs both registered impressive knowledge gains and exceed the 25% knowledge gain goal.
* The Education team’s focus on customer service and program delivery resulted in impressive 94% of Educators would recommend JAAZ programs to other educators.
* Launched two new K-12 initiatives to reach both youth detention center and foster youth during the 20-21 school year.
* Created and executed two virtual volunteer-led STEM Summits that provided $25,000 in funding and met the schools’ request to introduce students to high-demand STEM careers.
* Conducted 25 virtual JA Days utilizing various conference platforms that satisfied the needs of both our schools and funding partners.
* Enhanced JAAZ website by updating the Teacher/Parent Resources section to include access to JA USA’s volunteer-led kit videos and activities. This allowed ES and MS kit curriculum to be delivered by parents/educators.
* Transitioned the JA Student Stock Market Challenge from an in-person CAZ event to a virtual statewide student event reaching 565 students at the virtual event and 733 in the classroom.
* Integrated our in-person JA You’re Hired event into JA USA’s JA Inspire virtual event and merged our SAZ/CAZ events into one statewide student event; 3,610 students served with an impressive 40% knowledge gain and student recommendation rate of 91%.
* Redeveloped JA My Big Idea to run as a remote teacher-led entrepreneurship program for 10-year old students.