**ATLAS Nonprofit Lifecycles Self-Assessment**

Junior Achievement of Arizona (JAAZ) participated in the ATLAS Project through the Virginia G. Piper Charitable Trust in 2018-19. The JAAZ Boards approved the report in February 2019.

JAAZ’s ATLAS Capacity Improvement Plans for 2019-20 included a request for $50,000 from the Piper Trust to be used to assist with Fund Development and Marketing & Branding. Approximately $45,000 of this funding was used to refresh the brand image of JAAZ to better reflect the impact and innovation of programs. JAAZ worked with an external professional marketing/branding firm to create new messaging, imaging and materials; and to develop and implement a relationship campaign for targeted stakeholders.

Below is the 2023 update of the ATLAS Nonprofit Lifecycles Self-Assessment.

**Executive Summary**

During the past five years, JAAZ has continued to build upon its strengths, growing and improving its core programs while also innovating new programs and delivery methods to serve more of the students who need JA programs the most.

Throughout this time, JAAZ excelled at the move to more digital programs and remote work, worked through significant COVID-related challenges, significantly increased brand awareness and strategic partnerships, modernized the facilities, improved an already great work culture, and had the most successful year in JAAZ’s history.

**Lifecycle Placement in 2018 (green in diagram)**

The 2019 report stated:

The JAAZ ATLAS Leadership Team placed the organization in Mid-to-High-Growth, as the organization as recognized the link between successful programming and a strong organizational platform.

Effectively past the Turn-Around phase, JAAZ has rebounded back into Mid-Growth and is poised to address several opportunities that will make their programs more innovative, their fundraising more efficient, their boards more effective and their brand the stand-out brand it should be.

The JAAZ ATLAS Leadership Team put it this way: *at this point in our lifecycle, we have boundless opportunities and the energy and enthusiasm to achieve them*.

**Lifecycle Placement in 2023 (blue in diagram)**

JAAZ’s Leadership Team assessed the current Lifecycle Placement as low Maturity, at the peak of Vitality. There are areas of

The past fiscal year of 2021/22 was the most successful and exciting year in JAAZ’s history.

* Served 108,000 primarily low-income students – highest number ever
* Achieved Net Surplus of $2.7 million
* Raised $7 million in revenue, highest year ever
* Being viewed as a key strategic expert in the marketplace much more than ever before
* Have 100% (94% for year) staff job satisfaction and satisfaction with JA Arizona – JAAZ has an amazing team!

Diagram

Description automatically generated

Marketing & Branding

Facilities

**SWOT (Strengths, Weaknesses, Opportunities, Threats)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Strengths** | **Weaknesses** | **Opportunities** | **Threats** |
| * Culture * Staff * SAZ vibe * Rose * Innovation * Strong programs * Flexible * Contributions/ collaborations * Bomb leadership * Courage * Surplus/reserves * Tenure * Relationship building * BCRM * Efficiency * Processes * Ethics * Well-run * Infrastructure | * Bull Pen * Short staffed * Lots of priorities * Individual Giving Program * F&R percentage (in JABT/JAFP) * Inexperience of younger staff * Wealth/influence on the board * Inefficiency at individual level * Old building/location * Diversity of staff, board, and volunteers * Funding Model * Data management * Impact tracking * Cost to raise money * Digital-only offerings | * Government relations * Government funding * Positioning * Collaboration externally * Relationships * Value prop increasing * Positive customer perception * Alignment with community needs/ priorities * DAF movement * Arizona perception * Influx of new corporations and people | * Misperception * Politics * Board recognition * Other innovators/ providers * Tax credit * Economy * Individual money landscape shift * Smaller donor pool * DAF anonymity * Community heath * Teacher crisis * Fractured geography/ target pop districts * Lack of AZ headquarters * Labor market * Comp for money * Foundation sunsets |

**Part One: History, Values and Defining Moments**

***Defining Moments***

|  |  |
| --- | --- |
| 2020 | COVID Pandemic results in loss of in-person programs, decreases in funding, salary reductions |
| 2020 | JA expedites and expands virtual programs |
| 2021 | JA launches JA Inspire |
| 2022 | JA receives two multi-million dollar government grants |
| 2022 | JA has best year in its history:   * Served 108,000 primarily low-income students – highest number ever * Achieved Net Surplus of $2.7 million $2.5 million combined with JA Foundation * Raised $7 million in revenue, highest year ever * Being viewed as a key strategic expert in the marketplace much more than ever before * Have 100% (94% for year) staff job satisfaction and satisfaction with JA Arizona |

**Part Two: Market and External Environment**

**Marketing and Branding (2018 Start-Up; 2023 Mid-Growth)**

Regarding branding visibility and marketing, we have made tremendous progress in enhancing our profile in the AZ community. A few telling proof points: we have positively moved our net promoter score by 14 points (although there is still room to grow), we’ve significantly increased marketing- and windfall-donors (those that gave directly off campaigns or unknown to JA previously), and we have seen marked increase in ambassadorship/referrals through online and offline avenues. Our goal is to be considered a top tier charity – while we haven’t officially achieved that goal yet, we now have a “seat at the table” and carry more influence/prominence than ever before.

Where are we headed: we will continue to elevate JA’s brand position, with hopes of continuing to improve our net promoter score particularly with audiences in rural communities. Additionally, we have our eyes set on developing a new website that best reflects the JA of today, and will continue to enhance, test and expand marketing tactics that are proving effective.

**Strategic Partnerships**

Related, our efforts around development strategic partnerships have dramatically enhanced our brand visibility and position. We have most, if not all, key stakeholder organizations seeking to partner with us. We’re considered for grants and collaborations where we previously would not have been mentioned. We are considered an expert, on the bleeding-edge of career readiness and financial literacy education, and are viewed as a solution provider.

A priority focus area, we will continue to position JA as a leader in the K-26 education space. Some of this will be achieved through the programmatic expansion of JA Inspire, JA Money on the Move and 3DE launch. Additionally, we are seeking to position key leaders within JA as experts in the business and education arenas. Through the increased emphasis on strategic partnerships, we are confident that we will secure additional, large scale-funding previously unavailable to JA.

**Part Three: Programs (2018 – Maturity 2; 2023 – Growth 5 with established programs at Maturity 3 and new programs at Growth 2)**

JAAZ’s programs are constantly evolving and improving to be even more effective. JAAZ is a national leader in innovating to better meet the needs of the students who need JA’s programs the most. JAAZ is developing new ways to reach students wherever and however they are learning, including more digital and mobile offerings.

All of JA’s programs are hands-on and age-appropriate and equip today’s students with critical financial literacy, work readiness and entrepreneurship skills that will prepare them to succeed in work and life.

Highlights in recent years include:

* 2020 - JA evolved program delivery service to adapt to COVID-19 Pandemic
* 2021 - JA establishes JA Inspire program
* 2022 - JA secures large government grants to sustain and expand high-impact programming
* 2022 - JA serves more than 100,000 students annually

JAAZ is scheduled to provide in-school classroom and out-of-school programs to more than 120,000 students in Arizona during the 2022-23 school year. The focus is on serving primarily low-income, rural, and ethnically diverse students. JAAZ’s unique program model will place more than 5,700 community volunteers into nearly 400 schools where they will teach the JA curriculum and share their real-world experiences. To meet the needs of students during school closures and where they are learning, JAAZ has added three additional JA programs to its program menu:

* JA Finance Park Virtual
* JA BizTown Adventures
* JA Inspire

JAAZ is planning to launch two new initiatives, 3DE and JA Money on the Move, during the 2023-24 school year.

**Part Four: Management and Staffing (2018 – Growth 4; 2023 – Maturity 3)**

**Junior Achievement of Arizona Leadership Team**

The JAAZ leadership team consists of eight individuals.

**Katherine Cecala, President,** *October 2015*

Katherine provides the overall executive leadership and fiduciary oversight for JAAZ, and is actively involved in board and fund development. She guides the vision and strategic directions of JAAZ's mission. She has a diverse background in nonprofit leadership, healthcare administration, law, industrial engineering, utilities, and business. She also has extensive knowledge of our community and nonprofit landscape as she has served on over 40 nonprofit boards. A master’s level instructor at ASU for 12 years, Katherine has a B.S. in industrial engineering from LSU, an MBA from Louisiana Tech and a J.D. from the University of Arkansas.

**Sam Alpert, Chief Development Officer,** *July 2013*

Sam is responsible for overseeing up to $5 million in funding from corporate, individual, foundation and government partners. He manages a team of five staff members. Prior to JAAZ, he worked for ten years in advertising and public relations agencies, including owning his own agency for seven years. He has a Bachelor's in Journalism and an MBA from ASU.

**Joss Francheterre, Senior Vice President, Major Gifts** *May 2002*

Joss is responsible for fundraising $1 million through special events. Over the past 16 years he has created, changed, and improved many events while managing a staff of two. Originally from France, he has spent much of his life prior to JAAZ around the world where he has founded and run several successful businesses.

**Colleen Cox, Senior Vice President, Education** *September 2007*

Colleen oversees the implementation of education programs: JA BizTown, JA Finance Park, and in-classroom K-12 programs. Prior to JAAZ, she worked for E2C for seven years where she was the Director of Operations and Human Resources for their Amber Alert, Pets 911, and Earth 911 programs. She received a B.S. in Business Administration at the College of Charleston. She currently serves on the Tempe Union High School District CTE Evaluation Committee and previously served on the Phoenix Animal Care Coalition Board of Directors.

**Anne Landers, Vice President, Strategic Impact** *September 2014*

Anne oversees strategic partnerships and positioning for the organization. Before coming to JAAZ, she was the Interim Director at an international community development nonprofit, Life In Abundance, where she oversaw the U.S.-based operations and fundraising for the implementation of programs abroad. She began her career at a start-up advertising and PR agency, David and Sam PR (Decibel Blue). Anne holds a Bachelor of Arts in Journalism from ASU.

**Amy Schaefer, Vice President, Finance** *April 2011*

Amy is responsible for the financial management of the organization. She tracks cash flow, maintains internal and external controls, and manages a staff of one. She has owned her own business and has many years of experience in accounting as a controller, auditor, and accountant and is a CPA. She has a Bachelor of Science in Accountancy from NAU.

**Elizabeth Clements, Vice President, People & Technology** *July 2009*

Elizabeth provides guidance for staff development and strategic initiatives. She oversees office management, information technology, and is the chief culture officer and employee liaison while managing a staff of one. Prior to JAAZ, she wore many hats while working for small companies ranging from a cattle rancher to staffing agencies. She has a Bachelor of Arts in English from West Texas A&M University.

**Paloma Santiago District Director, Tucson** *October 2022*

Paloma Santiago is the District Director for the Southern Office, located in Tucson, and manages a staff of two. In Tucson, she is the chief fundraiser and has oversight of the special events and education programs. She has had a successful career as a leader and fundraiser in both nonprofit and education settings, including a prior stint with JAAZ a decade before returning to the organization.

**Staffing and Culture**

JAAZ continues to move forward with a more mobile workforce, creating shared workspaces and, despite supply chain issues, obtaining more laptops to help untether staff.

As an organization, we are working to hire more staff, some to replace numbers not filled during COVID, but most new positions to sustain new growth. We have a focus on creating more diversity in the workplace and have moved the needle by continue to seek and hire diverse staff and maintaining a staff led DEI committee. We have positioned ourselves to our best advantage in this difficult labor market by maintaining market accurate competitive salaries and top tier company culture.

Staff surveys reflect over 90% satisfaction in all categories.

**Southern Arizona District**

Junior Achievement of Arizona’s Southern District (SAZ) is in a very strong position. SAZ had its most successful fundraising year ever in 2021/22. A new director was hired in October 2022. With its new gutsy, strong-willed leader, the district will aim to inspire confidence in the team, board members, donors, volunteers, and the rest of its stakeholders. The current focus is on restructuring the team’s roles so systems and processes will streamline efficiently moving towards a result driven atmosphere. SAZ’s unique program model will place more than 600 community volunteers to teach 12,000 students the JA curriculum and share their real-world experiences.

The SAZ district’s top initiatives include:

•            Increase funding opportunities with individuals, corporations, and foundations.

•            Strategically grow educational programming where the need is high.

•            Build a stronger reputation and brand amongst Southern Arizona and its communities

**Part Five: Governance (2018 – Growth 2; 2023 – Maturity 2)**

JA Boards work well together and are very supportive of JA’s programs, operations, and staff. The Boards have all worked to improve the diversity of their members. JA Boards are continuing to recruit diverse community influencers and leaders, and to train members to be effective ambassadors and connectors for JA.

**Part Six: Financial Health (2018 – Growth 3; 2023 – Maturity 1)**

JAAZ’s financial health is stronger than it has ever been. JAAZ has about one year of operating expenses in reserves. The five-year Economic Model continues to be an excellent tool to assist with planning. The Model shows that the organization will be in excellent financial condition for the next couple of years, but that future years may have an operating loss. JA Leadership is committed to making adjustments as needed to ensure that its financial condition remains strong.

The past two years have had a large net surplus primarily due to the large ARPA (COVID-related) grants. JA is subject to a single audit because of the size of the government funding. JA has done a great job implementing processes to meet the complex requirements of these grants, and has undergone its first single audit with no significant findings.

**Junior Achievement’s fundraising team is focused on:**

* Individual Giving: Growing our major donor base ($5,000+ annually) and Summit Society ($1,000+) members. We expect to raise around $500,000 in FY 23-24 with an emphasis on growing our individual giving to $1M annually in the next 5 years. Major donors and Summit Society members make up, and will continue to make up, the majority of our individual giving. Also, there may be changes in our ability to qualify for the tax credit, which could decrease individual giving by $100,000+ annually.
* Government Funding: GEER and ESSER funding make up the majority of our revenue in FY 23-24 and 24-25. We will continue to build relationships with the Governor’s Office, Arizona Department of Education, legislators and other parties who have influence over the allocation of state and federal funding, so we are positioned to receive six- to seven-figure investments annually moving forward. Our team will also align with JA USA and their government relations efforts nationally, so we benefit in Arizona.
* Corporate Funding: We have elevated our corporate contributions to around $2MM annually in recent years. Strong economic conditions have contributed to the increase as well as fundraising for JA Inspire. Our team has also been more successful in securing JA BizTown sponsorships. Moving forward, our goal is to raise between $1.5MM-$2MM annually, but it will be contingent on the strength of our economy, the open shop sponsorships in JA BizTown, and in our ability to prospect for new donors effectively, especially with new programs like JA Inspire.
* Foundation Funding: While the pool of foundation funders is small in our market, we are optimistic in continuing relationships with our foundation partners to receive at least $400,000+ in annual funding. The growth in foundation funding will come from our launch of 3DE, Money on the Move, expansion and deepening of programming across the state, as well as our continued program innovation.

Overall, JA’s Development Team is very focused on building new donor relationships in the community and being diligent about investing their time and energy into the best donors and prospects. The onboarding of Instrumentl, JA’s new grants management and prospecting tool, and iWave, a major donor prospect and wealth screening tool, will also help JA grow its funding.

**Special Events**

Junior Achievement’s Special events team focus for 2022-23, and plans for 2023-24 and beyond include:

* Supporting JAAZ Fundraising overall goals by reaching/exceeding the budgeted goals. Our forecast for 2022-23 is $1,114,000 (budgeted goal $1,106,000). Goal for 2023-24 is $1,136,900 - taking in consideration the possibility of discontinuing one or more events (explanations below).
* Applying specific strategies to convert special event attendees to individual donors. Meeting with participants at the events, donation opportunities at events, follow-up calls, group emails, and individual invitations to tour JA BizTowns are implemented to capitalize on the entry point and visibility Special events generate. Follow-up with selected group of individuals (company owners, top executives) as Major Gifts prospects.
* Lowering the cost-to-raise-a-dollar. Continually finding ways to reduce the overall expenses for each event. Reducing the staff involvement in all parts of each event to minimize indirect cost. Finding and developing stronger volunteer base to take over the logistic and fundraising responsibilities for each event.
* For each event, analysis of the funds raised and return on investments (including JA visibility in community, potential entry point, etc.) compared to the fundraising costs and staff time investment, to decide if they are profitable to JAAZ or need to be discontinued.

**Part Seven: Facilities (2018 – Decline; 2023 – Maturity 4)**

In the last few years, the public areas of the building have improved significantly. Thanks to a $250K grant from Del Webb Foundation and significant in-kind donations from subcontractors, JAAZ was able to remodel JA BizTown 1 and the Lobby. The outside of the building was repainted and new signage consistent with the new branding was installed in 2022. These public areas look more modern, fresh, and do a much better job of reflecting JAAZ.

A grant of $50K related to a Piper Fellowship was used to make some updates to JA BizTown 2 in 2018, and new flooring was installed in this area in 2022. While JABT 2 has improved, more work is needed to better match the look and feel of the remodeled JABT 1.

JAAZ has made some changes to the interior office space (bull pen) such as removing some cubicle walls to open up the space, and installing some sky lights. JAAZ has budgeted to replace the furniture in the Schuster Conference Room in 2023. Much more work is needed to improve the interior employee office area.

**Part Eight: Administrative Systems (2018 – Growth 4; 2023 – Maturity 3)**

**Technology**

By 2019 JA had set up all of their employees, except the Facilities Manager, to be able to work remotely. When the pandemic hit in 2020, JA was able to move to fully remote work immediately. Employees have the tools needed to work effectively from anywhere. Computers are being updated regularly. Supply chain issues have caused delays to some of the upgrades.