I. CHESTER COUNTY COMMUNITY FOUNDATION

GRANT PROPOSAL SUMMARY SHEET

One page only. This page will be shared electronically with Grant Committee Members & Fund Advisors.

Note: If Philanthropy Network of Greater Philadelphia’s Common Grant Application is used, the Community Foundation’s Summary Sheet MUST accompany application.

To obtain an electronic version of this application, visit www.chescocf.org

Date 1/23/2019

Contact Information
Organization Name: Junior Achievement of Southeastern PA
Executive Director Name: Paul Kappel
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Executive Director E-mail: paul.kappel@ja.org
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Board of Directors Chair Name: Mike Rainone
Website: www.japhiladelphia.org
Primary Contact Name: Robin Olson
Year Incorporated: 1951
Primary Contact E-mail: Robin.olson@ja.org
FEIN: 23-1386172

Has your nonprofit ever applied to the Community Foundation? Yes x No__ Not Sure__
Has your nonprofit ever received funding from the Community Foundation? Yes __ No x__ Not Sure__
Donor Advised Fund(s) Fund for Chester County Don’t know/Not sure

Field/s of Interest:
___ Arts, Culture & Humanities ___ Environment/Animal Welfare ___ Education
___ Health ___ Human Services ___ Religion

Organization Information:
Geographic Area Served (If not all of Chester County, specify primary Chester County regions served): Chester, Bucks, Berks, Delaware, Montgomery, Lehigh, Northampton, & Philadelphia counties.

Describe Population Served and Annual Number of People Served:
We serve students, K-12 primarily from economically challenged schools and reach approximately 30,000 per year.

Mission: Junior Achievement inspires and prepares young people to succeed in a global economy through financial empowerment, career readiness and entrepreneurship education.

Proposal Summary:
This past year, Coatesville Area School District requested Junior Achievement to bring our unique and nationally successful program to all grades 3-5 students in all six elementary buildings in the District – ensuring that all Coatesville youth benefit. Our 3-5th grade programs are designed and maintained to be grade/age appropriate and address concepts that complement existing school curriculum including topics related to personal finance, career choice and connecting education to future success. A unique component of success for JA programs is our ability to engage volunteers from the community and local businesses as volunteer role models. For this program, Lockheed Martin’s Sikorsky Helicopter Division, Evolve IP and VOYA Financial Services are already committed as volunteer partners.

If Capacity Building Proposal, the focus is:
___ Mission, Vision & Strategy ___ Governance & Leadership ___ Strategic Relationships
___ Fundraising & Development ___ Technology Other: ________________________________

Annual Budget $1,260,000
69.39 % of budget for program expenses 7 ___ # of Full-Time Equivalent Paid Staff
27 % of budget for administrative expenses 25 ___ # of Board Volunteers
3.61 % of budget for fundraising expenses 1929 ___ # of Active Non-Board Volunteers
100 % total 182,277 ___ # of Volunteer Hours

Top 3-5 funding sources:
Zeigler Family Foundation $100,000
Bimbo Bakeries USA $90,000
Santander $35,000

Grant Amount Requested from the Community Foundation: $ 5,000___

8-2016
Organization’s history, goals, key achievements and distinctiveness

History
Since 1951, Junior Achievement of Southeastern Pennsylvania has been inspiring young people to own their economic success through financial empowerment, career readiness and entrepreneurship education. We believe that financial independence depends on early education and that’s why we work with students at all age levels to bring age appropriate finance education to students from kindergarten through 12th grade.

Our goal is to give students the tools they need to become successful adults—fully functioning members of society who are satisfied with their career. To achieve that goal, students must see the relevancy of school and financial management to their future. We meet students where they are, complimenting the classroom and expanding on concepts that may or may not be included in the schools teaching plan.

Goals:
At Junior Achievement of Southeastern PA, our organizational goal is to deliver quality financial literacy, career readiness and entrepreneurship education to 30,000 students in our 8-county service area. We work to provide volunteer mentors who are professionals in their community, highlighting for students the career choices they can make, how they fit into the community and how financial decisions they make today can impact their lives tomorrow.

Key Achievements:
Junior Achievement of Southeastern Pennsylvania has successfully established itself as a provider of solutions for schools who are interested in supplementing their in-class financial literacy and workforce readiness curriculum as well as for corporate partners interested in making an impact on the communities in which they operate. Over the past 11 years, we have achieved student growth each year and are now reaching nearly 30,000 students per year through 17 programs.

Distinctiveness:
Our uniqueness is in our delivery model. Our programs are delivered consistently through scripted materials and yet are varied because they are delivered by volunteers. Each one brings his or her own personal experiences into the classroom, sharing his or her career path and personal journey. Because they volunteer in the communities in which they live or work, students are able to see themselves in the volunteer and thus develop a sense of self efficacy and hope that they can reach beyond whatever circumstances they might be in and take control of their future success.

Funding request

Description of key initiatives
The Coatesville Area School District requested our unique and nationally successful programs to all grades 3-5 students in all six elementary schools in the District, ensuring that all Coatesville youth benefit. Our 3-5th grade programs are designed and maintained to be grade/age appropriate and address concepts that complement existing school curriculum including topics related to personal finance, career choice and connecting education to future success. A unique component of success for JA programs is our ability to engage volunteers from the community and local businesses as volunteer role models. For this program, Lockheed Martin’s Sikorsky Helicopter Division, Evolve IP and VOYA Financial Services are already committed as volunteer partners.

The objectives of the Advancing Financial Empowerment Program are:

1) Provide five (5) instructional hours of content to grades 3, 4 and 5 at all 6 Elementary Schools. This represents approximately 1100 students and will require more than 140 volunteers.
2) Secure financial and volunteer resources to implement the program in all six elementary schools in Year 2.
3) Implement Junior Achievement’s content to educate and inspire students to achieve their best:
   Grade 3: JA Our City introduces students to financial literacy and learning objectives for third–grade social studies, including characteristics of cities, importance of economic exchange, and how people and businesses in cities manage money. Students will apply money-management strategies to personal and business accounts.
   Grade 4: JA Our Region introduces students to entrepreneurship and how entrepreneurs use resources to produce goods and services. Students operate a hypothetical hot dog stand to understand the fundamental tasks performed by a business owner and to track the finances of a business
   Grade 5: JA Our Nation provides practical information about the need for employees who can meet the demands of the 21st century job market, particularly high-growth, high-demand jobs. By program's end, students will understand the skills, especially in science, technology, engineering, and math that will make their futures brighter.
   Grade 5: JA More than Money introduces students to financial literacy and entrepreneurship, and to social studies learning objectives that include money-management skills, goods and services, and global markets. Through hands-on activities students will learn a practical approach to starting a business and making smart decisions about managing money.
4) Engage volunteers from the community and local businesses as volunteer role models. Lockheed Martin’s Sikorsky Helicopter Division, Evolve IP and VOYA Financial Services are already on board for a second year. For year two we will recruit, train and support 45-60 local volunteers.

Specific needs and issues to be addressed
Our goal is to give students the tools they need to become successful adults—fully functioning members of society who are satisfied with their career. To achieve that goal, students must see the relevancy of school and financial management to their future. We meet students where they are, complimenting the classroom and expanding on concepts that may or may not be included in the schools teaching plan.

Why it is important to fund this now
We are responding directly to a request from the School District to implement these programs. Their request comes through the new state requirements for career readiness education in grades 3-11. The state requirements are in response to the Every Student Succeeds Act and implementation expectations begin in the current school year. Our goal is to generate the resources necessary not only to accommodate school and district requests but to bring the impact of Junior Achievement to as many students in our service area as possible.

How impact and results will be demonstrated
Through class registrations and a third party annual verification process, Junior Achievement is able to track school, teacher, student, and volunteer engagement. All first time volunteers are provided with a standardized volunteer training, fully preparing them to effectively present JA content and engage the students in their classroom. Following participation, teachers and volunteers complete post-program surveys which are reviewed for consistency and success. Finally, each year a sample of JA programs are selected to undergo Pre and Post Testing to review programs for effective knowledge and attitudinal change.