



21.28.P Junior Achievement of BC

COMMUNITY GRANT APPLICATION

SECTION A: APPLICANT INFORMATION

| | | |
|---|------------------------------------|----------------------------------|
| 1. ORGANIZATION NAME Junior Achievement of British Columbia (JABC) | | |
| 2. ORGANIZATION STREET ADDRESS #360 - 475 West Georgia Street, Vancouver, B.C. V6B 4M9 | | |
| 3. WEBSITE (IF APPLICABLE) https://jabc.ca/ | | |
| 4. GRANT APPLICATION MAIN CONTACT PERSON | | |
| NAME Susan Shepherd | PHONE (778) 350-4370 | EMAIL susan.shepherd@jabc.org |
| 5. ALTERNATIVE CONTACT PERSON | | |
| NAME Nancy Cardozo | PHONE (604) 355-1532 | EMAIL nancy.cardozo@jabc.org |
| 6. APPLICANT TYPE | | |
| <input type="radio"/> LOCAL REGISTERED NON-PROFIT SOCIETY | SOCIETY NO | DATE OF INCORPORATION |
| <input checked="" type="radio"/> REGISTERED CHARITY | CHARITABLE NO 11897-6166-RR0001 | |
| <input type="radio"/> NATIONAL/INTERNATIONAL NON-PROFIT OPERATING LOCALLY | SOCIETY NO | DATE OF INCORPORATION |
| <input type="radio"/> SPORT OR RECREATION ORGANIZATION | | |
| <input type="radio"/> OTHER | SPECIFY | |

SECTION B: GRANT INFORMATION

| | |
|---|--|
| 1. ARE YOU? <input checked="" type="radio"/> New Applicant <input type="radio"/> Returning Applicant | |
| 2. SELECT THE KIND OF COMMUNITY GRANT YOU ARE APPLYING FOR: <input type="radio"/> General Grant (Operating) <input checked="" type="radio"/> General Grant (Programming) <input type="radio"/> Recreational Sport Grant <input type="radio"/> Fee Waiver | |
| 3. AMOUNT YOU ARE REQUESTING: \$ 10,000.00 <input type="checkbox"/> In-Kind (check if applicable) | |
| 4. TOTAL COST OF THE PROJECT/EVENT/PROGRAM ETC. \$ 84,250.00 | |
| 5. IF YOU ARE A RETURNING APPLICANT AND ARE REQUESTING AN INCREASE OVER YOUR LAST YEAR GRANT AMOUNT AWARDED. PLEASE PROVIDE A RATIONALE FOR THE INCREASE. N/A | |

6. IF YOU ARE APPLYING FOR A GENERAL OPERATING GRANT, DESCRIBE HOW THIS GRANT WILL BE USED TO OFFSET COSTS INCURRED TO OPERATE THE ORGANIZATION. PLEASE DETAIL THE NATURE OF OPERATING EXPENSES (SALARY, LEASE, UTILITIES, ETC.) AND SPECIFY THE TIME PERIOD DURING WHICH THE GRANT WILL BE USED.

N/A

7. IF APPLYING FOR AN **OPERATING GRANT**: DESCRIBE HOW THE ORGANIZATION BENEFITS RESIDENTS OF BURNABY AND APPROXIMATELY HOW MANY BURNABY RESIDENTS BENEFIT FROM THE ORGANIZATIONS INITIATIVES ON AN ANNUAL BASIS?

IF APPLYING FOR A **PROGRAM GRANT**: DESCRIBE HOW THIS PROJECT/EVENT/PROGRAM WILL BENEFIT RESIDENTS OF BURNABY (WHO WILL BENEFIT). HOW MANY BURNABY RESIDENTS WILL BE INVOLVED WITH OR BENEFIT FROM THE PROGRAM?"

To become an adult without knowing how to manage money is to risk financial instability, debt, and a meager retirement. Our objective is to deliver 50 programs in 2022 to schools located in SD#41 Burnaby. There will be approximately 26 students in each of the 50 programs for a total estimated 1300 students. The 50 programs will also require the participation of 50 teachers and 50 to 100 local community volunteers. Although there is a large and sophisticated industry of financial professionals available to give financial information and advice, many of us get our information informally from friends, family, neighbors or the media. Assuming the 1300 students, 50 teachers and 50 volunteers all live in a 4-person household (2 parents and 2 children), with 2 friends and another 4 neighbors, the indirect benefit of these 50 programs will be over 11,000 Burnaby residents.

Applicants for **General Operating Grants** are not required to complete sections **C, D, and E** (marked with an asterisk *)

SECTION C: THE PROJECT/EVENT/PROGRAM*

| | |
|--|---|
| 1. NAME OF THE PROJECT/EVENT/PROGRAM Bright Futures for all Burnaby Youth | |
| 2. PROJECT/EVENT/PROGRAM LOCATION (PHYSICAL STREET ADDRESS OR EVENT LOCATION) Various Burnaby schools | |
| 3. PROJECT/EVENT/PROGRAM START DATE 2022-01-01 | 4. PROJECT/EVENT/PROGRAM END DATE 2022-12-30 |

SECTION D: PURPOSE OF BENEFIT*

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|--|
| 1. DESCRIBE THE PURPOSE OR GOAL OF THE PROJECT/EVENT/PROGRAM JABC's goal is to inspire, prepare and empower BC youth for lifelong success. On a regular basis we hear that University students struggle with massive debt. A recent Ipsos survey reported that more than 50% of Canadians are living within \$200/month of not being able to pay all their bills. In many cases, the concept that families can instill healthy financial habits in their children doesn't apply as it's difficult for parents to pass along skills they don't necessarily possess. If children are not learning financial skills at home, then they need to be provided with the opportunity to learn at school. A key role of schools is to prepare students to transition successfully towards a future career path. This involves providing curriculum opportunities to build students' general capabilities, support students' interests and aspirations, and help them to make informed decisions about their subject choices and career pathways. |
| 2. DESCRIBE THE PROJECT/EVENT/PROGRAM AND THE ACTIVITIES JABC offers free business programs to youth in Grades 4-12 that build skills in financial literacy, work readiness & entrepreneurship. Teachers request our programs as each program targets a learning outcome and goal that aligns with the B.C. school curriculum: Math, Economics, Accounting, Applied Design, Skills & Technology, Pre-Calculus, Social Sciences, Career Education, English Language and Arts. We partner with community volunteers to deliver the programs and bring their real-world experiences to the students. JABC's goal is to deliver 50 programs in School District #41 in the 2022 calendar year. Once delivery dates are confirmed with teachers, JA uses an equity, diversity & inclusion lens to recruit, screen, and train community volunteers. JA also provides teachers, students and volunteers with support materials. JABC business education programs are designed to encourage students' participation through hands-on activities, computer simulations, and games related to the topic. |

3. DESCRIBE HOW THE PROJECT/EVENT/PROGRAM ALIGNS WITH ONE OR MORE OF THE FOLLOWING ([OFFICIAL COMMUNITY PLAN](#), [SOCIAL SUSTAINABILITY STRATEGY](#), [ECONOMIC DEVELOPMENT STRATEGY](#), [ENVIRONMENTAL SUSTAINABILITY STRATEGY](#)):

A lack of financial and business education holds back entire communities from reaching their full potential. When credit card debt rises, consumers have less money to spend at local restaurants and shops. When someone defaults on a car loan, it affects a small business because that employee can't get to and from work. When a recent graduate has massive student loans to pay, they have a harder time putting a down payment on their first home. Working with youth offers the opportunity to intervene at a stage when they are still forming their habits and developing important socioemotional skills that can lead to more responsible financial behavior. JABC works in collaboration with local community businesses that generously support their staff as volunteers. JABC is unique in not only the broad range of programs and donors we attract, but the number of business volunteers engaged in program delivery.

4. IDENTIFY YOUR COMMUNITY PARTNERS OR STAKEHOLDERS – YOU MAY ALSO INCLUDE LETTERS OF SUPPORT FOR YOUR PROJECT/EVENT/PROGRAM FROM THESE GROUPS AS PART OF THE APPLICATION.

Last year approximately 300 volunteers from small businesses owners to specialists in large corporations across all industries, helped bring JABC's programs to life. JA volunteers not only help to inspire and prepare local students, but the experience also strengthens the volunteer's self-confidence, leadership, presentation and facilitation skills. Companies that encourage employees to volunteer with JA enhance their image by demonstrating their commitment to educating today's youth and supporting the local community.

5. IF THE AMOUNT REQUESTED FROM THE CITY OF BURNABY IS NOT FULLY GRANTED, WHAT WOULD YOU DO TO MAKE UP THE DIFFERENCE AND/OR HOW WOULD YOU PROCEED DIFFERENTLY?

JABC is constantly working to secure financial resources to accommodate all requests from educators in School District #41. Programs will be delivered proportionate to the amount of funding received. We have several proposals in progress, and are always working to ensure we have a full pipeline of potential and confirmed individual, corporate and Foundation donors.

SECTION E: EVENT OUTCOMES*

1. HOW WILL YOU KNOW IF YOUR PROJECT/EVENT/PROGRAM REACHED ITS GOALS? (FOR EXAMPLE, A GOAL OF ENGAGING YOUTH IN ENVIRONMENTAL ACTIVITIES MIGHT INCLUDE REACHING A SET TARGET OF YOUTH PARTICIPANTS)

- 1.GOAL: 60% of surveyed students better understand how their interests connect with career choices. OUTCOME: students are better able to set a goal, articulate the path to achieving their goal, and are more confident about their own abilities.
- 2.GOAL: 65% of surveyed students feel better prepared to plan and pursue a career. OUTCOME: youth have a better understanding of the breadth of career options available to them, and what educational pathway is required.
- 3.GOAL: 70% of students better understand how to create a budget and live as an independent adult. OUTCOME: in addition to financial literacy, students develop creativity, analytical and problem-solving, communication, and people skills

2. WHAT DATA AND FEEDBACK DO YOU COLLECT FROM YOUR AUDIENCE/PARTICIPANTS? HOW DO YOU EVALUATE YOUR PROGRAMS AND SERVICES?

A priority is to always Define, Measure and Communicate the benefit of JA programs. We have created a Model of Change and use surveys to gather feedback from students, educators and volunteers to evaluate the success of the programs. These surveys serve as the basis for final reporting that share the impact of your investment and the outcomes for students. For your reference, the following results reflect teacher sentiments for the 2-year period of 2018 – 2020: - 86% of educators are planning to host a JABC program again in the future - 93% rate their overall experience with JABC as a 4/5 or greater; and 100% would recommend JABC to a fellow educator. B.C. students who participated in JA's Economics for Success program said: 71% better understand how interests and talents connect with careers, 65% feel more prepared to plan and pursue a career; and 62% better understand how to create a budget and live as an independent adult.

Applicants for **Recreational Sport Grants** are not required to complete sections **F**, and **H** (marked by two asterisks **).

SECTION F: LONG TERM VIABILITY**

ATTENTION: The grant program is intended to support new organizations and encourage organizational self sufficiency, while creating a framework of financial sustainability rather than using City resources as an indefinite funding source. It is requested that your organization develop a diverse funding income base and seek alternative methods for self-sufficiency to ensure your organization's long-term operational sustainability.

| | | | | | |
|--|----------------------------------|-------------|------------|---------------------------------|-----------|
| 1. WHAT ARE YOUR SOURCES OF REVENUE? WHAT PERCENTAGE OF TOTAL REVENUE DO THEY EACH REPRESENT? | | | | | |
| SOURCE OF REVENUE | % OF TOTAL REVENUE PREVIOUS YEAR | | | % OF TOTAL REVENUE CURRENT YEAR | |
| EARNED REVENUE (ALL TICKET SALES, REGISTRATION FEES, MEMBERSHIPS, ETC...) | 0 | | | 0 | |
| GRANTS (ALL FEDERAL, PROVINCIAL, MUNICIPAL, FOUNDATION AND GAMING GRANTS) | 23 | | | 18 | |
| DONATIONS AND SPONSORSHIPS (CASH) | 75 | | | 80 | |
| DONATIONS AND SPONSORSHIPS (IN-KIND) | 2 | | | 2 | |
| ALL DONATIONS (CASH/IN-KIND) PROVIDED BY THE CITY OF BURNABY | 0 | | | 0 | |
| 2. WHAT OTHER SOURCES OF FUNDING ARE YOU CURRENTLY PURSUING? DOES THE ORGANIZATION HAVE A PLAN FOR DIVERSIFICATION AND INCREASE OF REVENUE OVER THE LONGER TERM? IF YES, PLEASE PROVIDE A COPY OF THE PLAN OR DESCRIBE THE PRIMARY OBJECTIVES AND STRATEGIES. | | | | | |
| <p>See attached 2021-2022 Annual Operating Plan.</p> <p>JABC is dependent upon sponsorships and donations for its continued operations. We are continually building deeper relationships with existing donors, and seeking new partnerships with individuals, corporations, community foundations, board of trades, chambers, industry associations, educational institutions, and other youth-education organizations whose goals and values align with ours.</p> | | | | | |
| 3. PLEASE IDENTIFY THE CASH VALUE (\$) OF ALL CITY OF BURNABY CONTRIBUTIONS YOUR ORGANIZATION/PROGRAM/EVENT HAS RECEIVED FROM THE CITY OF BURNABY OVER THE PAST THREE (3) YEARS. ADDITIONALLY, PLEASE INDICATE ANY OTHER CITY OF BURNABY GRANT OPPORTUNITIES YOU WILL BE PURSUING IN THE CURRENT YEAR. FAILURE TO IDENTIFY CITY OF BURNABY CONTRIBUTIONS MAY AFFECT YOUR ELIGIBILITY FOR GRANTS IN THE PRESENT YEAR AND IN THE FUTURE. | | | | | |
| | 3 YEARS AGO | 2 YEARS AGO | 1 YEAR AGO | CURRENT YEAR | |
| | | | | AWARDED | REQUESTED |
| GRANT - CASH | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| GRANT - IN-KIND | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| PERMISSIVE TAX EXEMPTION | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| LEASE GRANT | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| OTHER | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| 4. DESCRIBE THE TOP 3 GOALS FOR THE ORGANIZATION IN THE CURRENT YEAR. | | | | | |
| <p>GOAL 1</p> <p>Deliver 1,770 financial literacy, work readiness and entrepreneurship programs to Indigenous and nonIndigenous youth living in urban and rural communities (8% increase over previous 2020-2021 year)</p> | | | | | |
| <p>DESCRIPTION</p> <p>Support educators in incorporating career-life learning opportunities for students by positioning JABC as a thought leader in financial literacy, entrepreneurship, work readiness, youth education and the future of work. Host professional development opportunities at educator conferences including Career Education Society, Provincial Intermediate & Middle Years Teachers Association. Support educators in incorporating career-life learning opportunities for students.</p> | | | | | |

GOAL 2

Support students in making well informed career choices that can lead them to have a more optimistic outlook on life, sense of purpose & greater level of contribution that they make to their families and community;

DESCRIPTION

To meet the demand of JA programs, implement a marketing campaign to continually recruit community volunteers. Engage with community leaders to connect them with students to discuss various careers both in their community and the world outside their classrooms.

GOAL 3

Help students with developing confidence and gaining further knowledge around what is required to succeed in an ever-changing world

DESCRIPTION

Provide online and in-person curriculum opportunities to build students' general capabilities, support students' interests and aspirations, and help them to make informed decisions about their subject choices and pathways.

5. PLEASE COMPLETE THE FOLLOWING

| | PREVIOUS YEAR | CURRENT YEAR |
|--|---------------|--------------|
| NUMBER OF VOLUNTEERS (INCLUDING BOARD) | 800 | 300 |
| VOLUNTEER HOURS PER YEAR | 4,000 | 1,500 |
| NUMBER OF VOTING MEMBERS | 60 | 60 |

6. HOW DOES YOUR ORGANIZATION WORK TO ENSURE THAT PROGRAMS AND SERVICES ARE ACCESSIBLE AND INCLUSIVE FOR ANYONE WHO HAS AN INTEREST REGARDLESS OF AGE, ABILITY, ORIENTATION, ETHNIC/CULTURAL BACKGROUND, SOCIO-ECONOMIC STATUS? PLEASE SHARE EXAMPLES AND SUCCESS STORIES OF INCLUSIVITY AND DIVERSITY WITHIN YOUR ORGANIZATION AND PROGRAMMING.

JABC receives advice from an Educator Advisory Committee that gives feedback on program content, delivery methods, volunteer involvement and resources. Using an EDI lens, volunteers are recruited across all ethnicities and industries. After each program, JABC surveys teachers, students and volunteers on program content, execution, materials and the overall learning experience. Programs are available online or in-person and are free to students in Grades 4-12 regardless of learning environment or socio- economic background (Public, Independent, Francophone & Indigenous schools - including special needs, English Language Learning & homeschooling). Ex: during the 2020-21 school year, 27 programs were delivered in-community to 439 Indigenous students. 9% of JABC programs were delivered to Indigenous classes (those with at least 25% Indigenous students as confirmed by the host teacher or school demographics).

SECTION G: INSURANCE AND ACKNOWLEDGEMENT*

1. DOES YOUR ORGANIZATION HAVE GENERAL LIABILITY INSURANCE?

☒ Yes

☐ No

2. IF YES, WHAT COVERAGE?

Property

Equipment breakdown

Business Income

Crime

Professional Fees

3rd party employee dishonesty

3. IF AWARDED A GRANT, HOW WILL YOUR ORGANIZATION ACKNOWLEDGE THE CONTRIBUTION FROM THE CITY OF BURNABY?

Recognition in year-end thank you ad for all JABC donors in the Vancouver Sun

Recognition in JABC's Annual Report, at the respective giving level

Thank you letter and tax receipt

Customized stewardship report at year end (July 2022)

Invitations to Provincial and/or Regional events

SECTION H: OPERATING BUDGET FOR ORGANIZATION or PROJECT/EVENT/PROGRAM**

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|--|
| 1. PLEASE IDENTIFY IF YOU ARE PROVIDING INFORMATION FOR THE ENTIRE ORGANIZATION OR A SPECIFIC PROJECT/EVENT/PROGRAM <input checked="" type="radio"/> Organization <input type="radio"/> Project/Event/Program |
| 2. FOR THE FISCAL YEAR 2021-2022 |
| 3. MONTH FISCAL YEAR BEGINS July 2021 |

| REVENUES | PRIOR YEAR ACTUAL | CURRENT YEAR BUDGET | CURRENT YEAR CONFIRMED? Y/N | BRIEF DESCRIPTIONS/COMMENTS (TYPE OF GRANT AND FUNDING PERIOD) |
|---------------------------------|-------------------|---------------------|-----------------------------|--|
| FEDERAL GOVERNMENT (SPECIFY) | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| PROVINCIAL GOVERNMENT (SPECIFY) | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| LOCAL GOVERNMENT (SPECIFY) | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| SPONSORSHIP (SPECIFY) | | | | |
| 1 BC Business Hall of Fame | 459404 | 870000 | | Gala event |
| 2 Leadership Breakfast | 10000 | 30000 | | Donor appreciation event |
| 3 Other events | 347408 | 456750 | | |
| EARNED REVENUE | | | | |
| 1 Endowment & Interest | 194312 | 64500 | | |
| 2 Wage/Rent Subsidy | 289487 | - | | Federal Government COVID support |
| 3 | | | | |
| FUNDRAISING (NET REVENUE) | | | | |
| INDIVIDUAL DONATIONS | 343081 | 600000 | | |
| IN-KIND SOURCES | | | | |
| INVESTMENT INCOME | | | | |
| OTHER SOURCES (SPECIFY) | | | | |
| 1 Corporate donations | 592627 | 912000 | | |
| 2 Foundation donations | 672005 | 680000 | | |
| 3 | | | | |
| TOTAL REVENUE | 2908324 | 3613250 | | |

| EXPENDITURES | PRIOR YEAR ACTUAL | CURRENT YEAR BUDGET | BRIEF DESCRIPTIONS/ COMMENTS (TYPE OF GRANT AND FUNDING PERIOD) |
|---|-------------------|---------------------|--|
| TOTAL COMPENSATION EXPENSE | 1798899 | 2241000 | |
| OFFICE SUPPLIES & EXPENSES | 224485 | 321050 | |
| PROGRAM & EVENT SUPPLIES | 245696 | 356540 | |
| ADVERTISING & PROMOTION | 40513 | 39900 | |
| TRAVEL & VEHICLES EXPENSES | | | |
| INTEREST AND BANK CHARGES | | | |
| LICENCES, MEMBERSHIPS, & DUES | | | |
| OCCUPANCY COSTS | | | |
| PROFESSIONAL & CONSULTING FEES | | | |
| CAPITAL PURCHASES & IMPROVEMENTS | | | |
| AMORTIZATION OF CAPITALIZED ASSETS | | | |
| DONATION, GRANTS, & SCHOLARSHIP EXPENSE AS PART OF CHARITABLE ACTIVITIES | 12762 | 35910 | |
| EDUCATION AND TRAINING FOR STAFF & VOLUNTEERS | | | |
| CITY SERVICES EXPENSES (SPECIFY) | | | |
| 1 | | | |
| 2 | | | |
| 3 | | | |
| OTHER EXPENSES (SPECIFY) | | | |
| 1 Special Programs and Events | 343104 | 595050 | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| TOTAL EXPENDITURES | 2665459 | 3589450 | |
| CURRENT SURPLUS (DEFICIT) | 242865 | 23800 | |