# **Return of Organization Exempt From Income Tax**

Department of the Treasury Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

Open to Public Inspection

▶ Do not enter Social Security numbers on this form as it may be made public.

▶ In	nformation	about Form	990 and its	s instructions is a	t www.irs.gov/form990.
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A F	or th	e 201	3 calen	dar year, or ta	x year be	ginning		07,	/01 <b>,2013</b>	3, and	ending			06/3	30, 20	0 14	
_			C Name	of organization								D E	mployer i	dentification	on nun	nber	
ВС	heck if ap	oplicable:	JUN	IOR ACHIEV	EMENT U	ISA						8	34-126	67604			
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	Name	change	Numb	er and street (or F	O. box if mail	is not delivere	d to street	addres	ss)	Room/	suite	E T	elephone	number			
	Initial	return	ONE	EDUCATION	WAY							(71	9) 54	40-800	0 (		
	Term	inated	City o	r town, state or pr	ovince, countr	y, and ZIP or f	oreign post	tal code	9	•							
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		cation	F Name	and address of pr	incipal officer:	JACK	KOSA	KOWS	SKI, PRE	ES &	CEO			oup return fo	r	Yes	X No
		9	ONE	EDUCATION	WAY CC	LORADO	SPRING	GS,	CO 8090	6			subordinate Are all subo	rdinates include	ed?	Yes	No
Π	Tax-ex	empt st	atus:	X 501(c)(3)	501(c)	( ) <b>4</b>	(insert no.)	)	4947(a)(1)	or	527		If "No," atta	ach a list. (se	e instru	ctions)	
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For Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2013) Page 2

Pa		of Program Service A hedule O contains a i	Accomplishments response or note to any line in this Par	: III	X
1	Briefly describe the TO INSPIRE ANI	organization's missior D PREPARE YOUNG	· · · · · · · · · · · · · · · · · · ·		
2	prior Form 990 or 9		ficant program services during the years of the control of the con		
3	Did the organization	on cease conducting	, or make significant changes in		
4	Describe the organ expenses. Section	501(c)(3) and 501(c)	Iule O. rvice accomplishments for each of (4) organizations are required to represent to represent the reported of the reporte		
4a	THE ORGANIZATI MAINTAINING TH ACHIEVEMENT PR	ON ASSISTED IT HEIR OWN ORGANI ROGRAMS. JA'S HTARY THROUGH P	980,753. including grants of \$  S US AREAS IN SETTING UP A ZATION TO ADMINISTER JUNIO MEMBERS REACHED APPROXIMA OST-SECONDARY STUDENTS FOR	AND/OR DR FELY 4.6	14,352,178)
4b	(Code:	) (Expenses \$	including grants of \$	) (Revenue \$	)
4c	: (Code:	) (Expenses \$	including grants of \$	) (Revenue \$	)
4d	· -	ices (Describe in Sche			
4e		including gr ce expenses ►		<del>∪</del> φ )	

Form 990 (2013)
Part IV Page 3

Part	Checklist of Required Schedules		.,	
_			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes,"		37	
_	complete Schedule A	1	X	
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	2	Х	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to	_		7.7
	candidates for public office? If "Yes," complete Schedule C, Part I	3		X
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h)		.,	
	election in effect during the tax year? If "Yes," complete Schedule C, Part II	4	Х	
5	Is the organization a section $501(c)(4)$ , $501(c)(5)$ , or $501(c)(6)$ organization that receives membership dues,			
	assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C,	_		3.7
_	Part III	5		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors			
	have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If			V
_	"Yes," complete Schedule D, Part I	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,	_		Х
	the environment, historic land areas, or historic structures? <i>If</i> "Yes," <i>complete Schedule D, Part II</i>	7		
8	complete Schedule D, Part III	8		Х
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a	-		
9	custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or			
	debt negotiation services? If "Yes," complete Schedule D, Part IV	9	X	
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted			
	endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V	10	X	
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI,			
	VII, VIII, IX, or X as applicable.			
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes,"			
	complete Schedule D, Part VI	11a	Х	
b	Did the organization report an amount for investments-other securities in Part X, line 12 that is 5% or more			
	of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		X
С	Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more			
	of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c		X
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets			
	reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	11d		X
	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e		X
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses			
	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f		X
12 a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes,"		.,	
_	complete Schedule D, Parts XI and XII	12a	Х	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if	401-		V
40	the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b		$\frac{X}{X}$
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13 14a		X
	Did the organization maintain an office, employees, or agents outside of the United States?	144		- 11
b	fundraising, business, investment, and program service activities outside the United States, or aggregate			
	foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	14b	X	
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or			
	for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	15	X	
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other			
	assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		Х
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on			
	Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)	17		Х
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on			
	Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18		X
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a?			
	If "Yes," complete Schedule G, Part III	19		X
	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		

Form 990 (2013) Page **4** 

Part I	V Checklist of Required Schedules (continued)			
			Yes	No
21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or			
	government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21	Х	
22	Did the organization report more than \$5,000 of grants or other assistance to individuals in the United States			
	on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22		Χ
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the			
23				
	organization's current and former officers, directors, trustees, key employees, and highest compensated	22	X	
	employees? If "Yes," complete Schedule J	23	Λ	
24 a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than			
	\$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b			
	through 24d and complete Schedule K. If "No," go to line 25a	24a		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
С	Did the organization maintain an escrow account other than a refunding escrow at any time during the year			
	to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25 a	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction			
	with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a		Χ
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior			
	year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ?			
	If "Yes," complete Schedule L, Part L	25b		Χ
26	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payable to any			
	current or former officers, directors, trustees, key employees, highest compensated employees, or			
	disqualified persons? If so, complete Schedule L, Part II.	26		Χ
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee,			
	substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled			
	entity or family member of any of these persons? If "Yes," complete Schedule L, Part III	27		Х
00	Was the organization a party to a business transaction with one of the following parties (see Schedule L,	21		21
28				
	Part IV instructions for applicable filing thresholds, conditions, and exceptions):	00-		7.7
	A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	28a		Х
b	A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete			
	Schedule L, Part IV	28b		Х
С	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof)			
	was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV	28c		Х
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29	Х	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified			
	conservation contributions? If "Yes," complete Schedule M	30		Х
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N,			
	Part I	31		Χ
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes,"			
	complete Schedule N, Part II	32		Χ
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations			
	sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	33		Χ
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III,			
•	or IV, and Part V, line 1	34	Х	
35 a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		Х
	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a			
b	controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b		
26	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable	335		
36		26		
. 7	related organization? If "Yes," complete Schedule R, Part V, line 2	36		
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization			
	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R,	_		7.7
	Part VI	37		Х
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and			
	19? <b>Note</b> . All Form 990 filers are required to complete Schedule O	38	X	

Form 990 (2013) Page 5

Par				
	Check if Schedule O contains a response or note to any line in this Part V			-
	= 1		Yes	No
	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	ł I		
	Effici the number of Forms W-20 included in line 1a. Effici -0- in not applicable.			
C	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	Х	
22	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax			
<b>2</b> a	Statements, filed for the calendar year ending with or within the year covered by this return . 2a 88			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	Х	
	<b>Note</b> . If the sum of lines 1a and 2a is greater than 250, you may be required to <i>e-file</i> (see instructions)			
3 a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3 a		Х
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O	3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority			
	over, a financial account in a foreign country (such as a bank account, securities account, or other financial			
	account)?	4a		Х
b	If "Yes," enter the name of the foreign country: ▶			
_	See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.	_		3.7
	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		X
	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b 5c		Λ
	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?  Does the organization have annual gross receipts that are normally greater than \$100,000, and did the	30		
va	organization solicit any contributions that were not tax deductible as charitable contributions?	6a		Х
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or			
-	gifts were not tax deductible?	6b		
7	Organizations that may receive deductible contributions under section 170(c).			
а	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods			
	and services provided to the payor?	7a		Х
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
С	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was			
	required to file Form 8282?	7 c		X
	If "Yes," indicate the number of Forms 8282 filed during the year	70		Χ
	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e 7f		X
	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7g		21
_	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7 h		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting			
	organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring			
	organization, have excess business holdings at any time during the year?	8		
9	Sponsoring organizations maintaining donor advised funds.			
а	Did the organization make any taxable distributions under section 4966?	9 a		
b	Did the organization make a distribution to a donor, donor advisor, or related person?	9b		
10	Section 501(c)(7) organizations. Enter:			
	Initiation fees and capital contributions included on Part VIII, line 12			
	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities			
11	Section 501(c)(12) organizations. Enter:  Gross income from members or shareholders			
	Gross income from members or snareholders			
	against amounts due or received from them.)			
12 a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
	If "Yes," enter the amount of tax-exempt interest received or accrued during the year			
	Section 501(c)(29) qualified nonprofit health insurance issuers.			
	Is the organization licensed to issue qualified health plans in more than one state?	13a		
	Note. See the instructions for additional information the organization must report on Schedule O.			
b	Enter the amount of reserves the organization is required to maintain by the states in which			
	the organization is licensed to issue qualified health plans			
	Enter the amount of reserves on hand	4.4		V
	Did the organization receive any payments for indoor tanning services during the tax year?	14a 14b		X
a	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14D		

**b** If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O . . . . .

JSA 3E1040 1.000

Form 990 (2013) JUNIOR ACHIEVEMENT USA Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions. Section A. Governing Body and Management No Yes 30 1a Enter the number of voting members of the governing body at the end of the tax year . . . . If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O. 29 Enter the number of voting members included in line 1a, above, who are independent . . . . Did any officer, director, trustee, or key employee have a family relationship or a business relationship with Χ 2 3 Did the organization delegate control over management duties customarily performed by or under the direct 3 supervision of officers, directors, or trustees, or key employees to a management company or other person? . . 4 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?..... 5 5 Did the organization become aware during the year of a significant diversion of the organization's assets?.... 6 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint Χ b Are any governance decisions of the organization reserved to (or subject to approval by) members, Χ Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: Χ 8a a The governing body?..... Χ 8b Is there any officer, director, trustee, or key employee listed in Part VII. Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O . . . . . . . . . . Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.) No Χ 10a b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, Χ 10b affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . . . Χ 11<u>a</u> 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?. b Describe in Schedule O the process, if any, used by the organization to review this Form 990. Χ 12a b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give Χ 12b rise to conflicts? c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," Χ 12c describe in Schedule O how this was done 13 Χ 13 14 14 Did the organization have a written document retention and destruction policy?...... Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? Χ 15a 15b If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions). 16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement Χ 16a b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? 16h Section C. Disclosure List the states with which a copy of this Form 990 is required to be filed  $\triangleright \_CA \underline{CT} \underline{CT} \underline{NY} \underline{CT}$ 17 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only)

available for public inspection. Indicate how you made these available. Check all that apply.

| X | Upon request Other (explain in Schedule O) Another's website

Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and 19 financial statements available to the public during the tax year.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ▶ Timothy armijo one Education way colorado springs, co 80906

#### Form 990 (2013) Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees. Part VII **Independent Contractors**

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's former officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	box,	not ch unles er and	Pos reck s pe	morerson	e than constant of the street	an tee)	(D)  Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
						<u> </u>				
(1)AINAR D. AIJALA, JR.	2.00									
DIRECTOR		Х						(	0	
(2)EVELYN ANGELLE	2.00									
TREASURER		Х		Χ				C	0	C
(3)LIZ ARKY	2.00									
DIRECTOR THROUGH 12/2013		Х						(	0	C
(4)ALAN S. ARMSTRONG	2.00									
DIRECTOR		Х						(	0	
(5)SANDRA BEACH LIN	2.00									
DIRECTOR		Х						(	0	
_(6)MARK_BRENNER	2.00									
DIRECTOR		Х						C	0	
_(7)CATHERINE S. BRUNE	2.00									
VICE-CHAIR		Х		Χ					0	
_(8)RODNEY D. BULLARD	2.00									_
DIRECTOR		Х						(	0	C
_(9)AGUSTIN_CARCOBA	2.00									_
DIRECTOR		Х						(	0	
(10) JAMES M. CARROLL	2.00	.,								_
DIRECTOR	2.00	X							0	
(11)MICHAEL DENISZCZUK	2.00	17						_		(
DIRECTOR	2.00	X							0	
(12)LYNNE FORD DIRECTOR		X							0	(
(13)JEFF HANSBERRY	2.00	^							0	
DIRECTOR THROUGH 11/2013		X							0	(
(14) PERRY HEWITT	2.00	27							,	
DIRECTOR		X							0	(
DIMETON						<u> </u>			<u>′I</u>	5 000 (2242)

Form **990** (2013)

JSA.

Part VII Section A. Officers, Directors,		y ⊑11	.piu			and f	ııyı			
( <b>A</b> ) Name and title	(B)  Average hours per week (list any hours for	box,	unles	ss pe d a d	ition more	e than o is both or/trust	an	( <b>D)</b> Reportable compensation from the	(E) Reportable compensation from related organizations	(F) Estimated amount of other compensation
	related organizations below dotted line)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	organization (W-2/1099-MISC)	(W-2/1099-MISC)	from the organization and related organizations
5) KYLE H. HYBL	2.00									
DIRECTOR		Х						0	0	
6) CLYDE D. KEATON	2.00									
DIRECTOR		Х						0	0	
7) DEBORAH J. KISSIRE	2.00									
DIRECTOR	2 00	X						U	0	
8) LOREN_C. KLUG DIRECTOR	2.00	X								
9) LARRY LEVA	2.00	Λ							0	
CHAIR		X		Х				0	0	
)) ROBERT LLOYD	2,00									
DIRECTOR		Х						0	0	
l) KEVIN MCKAY	2.00									
DIRECTOR THROUGH 09/2013		Х						0	0	
2) PAUL E. MCKNIGHT	2.00									
DIRECTOR		Х						0	0	
3) GREGORY MCSTRAVICK	2.00									
DIRECTOR	2,00	X						U	0	
4) JULIE A. MONACO SECRETARY		X		Х						
5) DAVID PALENCHAR	2.00	Λ		Λ					0	
SECRETARY THROUGH 12/2013		X		Х					0	
b Sub-total							<b>—</b>	0	0	
c Total from continuation sheets to Part VII	I. Section A							2,717,884.	0	568,103
d Total (add lines 1b and 1c)							$\blacktriangleright$	2,717,884.	0	568,103
2 Total number of individuals (including but r reportable compensation from the organiza		hose 13		d al	00V6	e) who	re	ceived more than	\$100,000 of	
										Yes N
B Did the organization list any former of employee on line 1a? If "Yes," complete Sch										3 X
For any individual listed on line 1a, is the organization and related organizations individual	greater than	\$15	0,0	00?	lf	"Yes	,"	complete Schedu	le J for such	4 X
5 Did any person listed on line 1a receive for services rendered to the organization? In	or accrue co	mpen	sati	on f	ron	n any	un	related organization	on or individual	5
Section B. Independent Contractors										
Complete this table for your five highest compensation from the organization. Repo										

year.

(A) Name and business address	(B) Description of services	(C) Compensation
ATTACHMENT 1		

Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization ► 15

Part '			.y ⊑11	ipic			and I	1191			
	( <b>A)</b> Name and title	(B) Average hours per			Pos heck		e than o is both		(D) Reportable compensation	(E) Reportable compensation from	<b>(F)</b> Estimated amount of other
		week (list any hours for related organizations below dotted line)					Highest compensated employee		from the organization (W-2/1099-MISC)	related organizations (W-2/1099-MISC)	compensation from the organization and related organizations
	ONAS PRISING	2.00									
	IRECTOR D RAPP	2.00	X						U	U	1
	IRECTOR	2.00	X								ı
	OBERT REEG	2.00	Λ						0	U	'
	IRECTOR		X								1
	AMES RUNNELS	2,00								0	
	IRECTOR	<del></del>	X							0	
	ISA SODEIKA	2,00								,	
	IRECTOR THROUGH 01/2014		X						0	0	(
31) A	LBERT E. SUTER	2.00									
D	IRECTOR		Х						0	0	
32) I	HOMAS D. WELDON	2.00									
	IRECTOR		Х						0	0	1
33) R	ICHARD A. WOODS	2.00									
	IRECTOR		Х						0	0	
	EAN C. RUSH	2.00									
	IRECTOR		Х						0	0	-
P	ACK E. KOSAKOWSKI RESIDENT & CEO	40.00	Х		Х				432,275.	0	50,016
	IMOTHY ARMIJO	40.00	-		177				100 261		
	FO				Х				182,361.	U	55 <b>,</b> 777.
16 St	ib-total										
	otal from continuation sheets to Part VII, So otal (add lines 1b and 1c)					• •					
	otal number of individuals (including but not						e) who	re	ceived more than	\$ 100 000 of	
	portable compensation from the organization		13		ua	DOV	e) wiic	) 10	ceived inore than	φ 100,000 OI	
		·									Yes No
<b>3</b> Di	d the organization list any <b>former</b> offic	er directo	or or	tri	ıste	e	kev e	mn	olovee or highes	t compensated	100 110
	nployee on line 1a? If "Yes," complete Schedu										3 X
	or any individual listed on line 1a, is the										
	ganization and related organizations gre										
ine	dividual										4 X
	d any person listed on line 1a receive or										
	r services rendered to the organization? If "Ye	es," comple	te Sch	nedu	ıle J	l for	such	per	son		5 X
	on B. Independent Contractors										
CO	omplete this table for your five highest com mpensation from the organization. Report c ar.										

(A) Name and business address	(B) Description of services	(C) Compensation

Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization ▶

(A)	(B)			(C)	١			(D)	(E)		e <i>d)</i> (F)
Name and title	Average hours per week (list any hours for	Average Position Reportable compensation compensation box, unless person is both an officer and a director/trustee) Reportable compensation compensation from relater organization from compensation relater organization from relater organization from compensation relater organization from compensation from relater organization from compensation from compensation from relater organization from compensation f						Reportable compensation from related organizations	an com	stimated nount of other pensation om the	
	related organizations below dotted line)	Individual trustee or director	Institutional trustee	Officer	íey employee	Highest compensated employee	Former	organization (W-2/1099-MISC)	(W-2/1099-MISC)	org an	anization d related anizations
37) CECIL THIBODEAUX EVP	40.00			Х				292,381.	0		65,209
38) GARY BLANCHETTE  SVP - DEVELOPMENT	40.00			X				244,656.	0	1	12,809
39) LISA GILLIS CHIEF ACADEMIC OFFICER	40.00			Х				250,186.	0		22,852
40) SUSAN LUU SVP - BUSINESS IMPROVEMENT	40.00			Х				208,774.	0		25 <b>,</b> 13
41) LESLIE PIERCE SVP TALENT & ORGANIZATION DEV.	40.00				Х			155,934.	0		28,509
42) ED GROCHOLSKI SVP - BRAND	40.00				Х			229,236.	0		26,40
43) HOWARD BARTNER SVP - OPERATIONS	40.00				Х			174,591.	0		67 <b>,</b> 292
44) STEVE SCHMIDT SVP - OPERATIONS	40.00				Х			181,027.	0		34,59
45) CHRISTINE KUNZ  VP - OPERATIONS	40.00					Х		132,583.	0		26,923
46) JACQUELINE DANT  VP - OPERATIONS	40.00					Х		120,135.	0		26,50
47) KRIS PONCIROLI  VP DONOR RELATIONS & DEV SVCS	40.00					Х		113,745.	0		26,07
c Total from continuation sheets to Part VII, S							<b>&gt; &gt; &gt;</b>				
d Total (add lines 1b and 1c)	limited to tl		isted				re	ceived more than	\$100,000 of		
3 Did the organization list any former office	er, directo	r, or	trus								Yes N
<ul> <li>employee on line 1a? If "Yes," complete Schede</li> <li>For any individual listed on line 1a, is the sorganization and related organizations greater</li> </ul>	sum of rep eater than	ortab \$15	le co 0,00	mp 0?	ens If	sation <i>"Yes,</i>	aı "	nd other compens complete Schedu	sation from the le J for such	3	Σ
<ul><li>individual</li></ul>							un	related organization	on or individual	4	X
for services rendered to the organization? If "Ye											

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax

(A) Name and business address	(B) Description of services	(C) Compensation

Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization ▶

Part VIII	Statement	of Revenue
-----------	-----------	------------

		Check if Schedule O contains a respo	nse or note to ar	ny line in this Part VI	III		X
				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
nts	1a	Federated campaigns 1a	17,981.				
Contributions, Gifts, Grants and Other Similar Amounts	b	Membership dues 1b					
ts, (	С	Fundraising events 1c					
iai	d	Related organizations 1d					
ns, Sim	е	Government grants (contributions) 1e					
utio er \$	f	All other contributions, gifts, grants,					
ē Ē		and similar amounts not included above . 1f	9,601,847.				
ou	g	Noncash contributions included in lines 1a-1f: \$	460,907.				
	h	Total. Add lines 1a-1f		9,619,828.			
Program Service Revenue			Business Code				
eve	2a	AREA LICENSE FEES	611710	4,639,212.	4,639,212.		
e e	b	SUPPORT FEES	611710	400,000.	400,000.		
Ξ	С						
Š	d						
Гап	е						
0	f	All other program service revenue					
	9	Total. Add lines 2a-2f		5,039,212.			
	3	Investment income (including dividends, inter		245 224			245 224
		other similar amounts)		245,234.			245,234.
	4	Income from investment of tax-exempt bond p  Royalties • • • • • • • • • • • • • • • • • • •		0			
	5	(i) Real	(ii) Personal	0			
	6.	Gross rents					
	6a b	Less: rental expenses					
	C	Rental income or (loss)					
	d	Net rental income or (loss)		15,049.			15,049.
		(i) Securities	(ii) Other	=5,515,			,
	7a	Gross amount from sales of assets other than inventory 3,598,037.					
	b	Less: cost or other basis					
	_	and sales expenses 3,341,565.					
	c	Gain or (loss)					
	d	Net gain or (loss)		256,472.			256,472.
<u>a</u>	8a	Gross income from fundraising					
'n		events (not including \$					
eV6		of contributions reported on line 1c).					
Ř		See Part IV, line 18 a					
Other Revenue	b	Less: direct expenses b					
ŏ	С	Net income or (loss) from fundraising events .		0			
	9 a	Gross income from gaming activities.					
		See Part IV, line 19 a					
	b	Less: direct expenses b					
	С	Net income or (loss) from gaming activities		0			
	10a	Gross sales of inventory, less					
		returns and allowances a					
	b	Less: cost of goods soldATCH . 2 . b  Net income or (loss) from sales of inventory.	5,308,444.	0.050.505	0.050.505		
	٣	Miscellaneous Revenue	Business Code	8,950,586.	8,950,586.		
	44-	MISCELLANEOUS	900099	362,380.	362,380.		
	11a b	MISCALLANEOUS	200099	302,300.	302,300.		
	C						
	d	All other revenue					
	e	Total. Add lines 11a-11d		362,380.			
	12	Total revenue. See instructions		24,488,761.	14,352,178.		516,755.

# Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Description   Comparison   Co	Check if Schedule O contains a response				
Contain and other assistance to governments and organizations in the United States. See Part IV, line 12.					
Separate and other assistance to individuals in the United States. See Part IV, line 22.   0		Total expenses			
the United States. See Part IV, line 22 0 0		3,278,482.	3,278,482.		
Peneling paid to or for members   0		0			
United States, See Part IV, Inces 15 and 16,	3 Grants and other assistance to governments,				
Benefits paid to or for members   0	,				
5 Compensation of current officers, directors, trustees, and key employees processes and controlled above, to disqualified persons (see defined under section 49880(1)) and persons described in section 49880(1)) and persons described in section 49880(1) and persons described in section 49880(1)) and persons described in section 49880(1) and persons described in section 49880(1)) and the person described in section 49880(1) and persons described in action 4980 (1) and persons described in section 4980 (1) and persons described in section 4980 (1) and persons described in section 4980 (1) and persons described in action 4980 (1) and persons de		59,705.	59,705.		
Compensation act included above to disqualified persons (as defined under section 4956((N)1) and persons described in section 4956((N)1) and (N)1) and (N)2) and (N)3 and (N)4 and (N)4) and (N)4 and (N)4 and (N)4) and (N)4 and (N)4 and (N)4 and (N)4 and (N)4) and (N)4 and (N)4 and (N)4 and (N)4) and (N)4 and (N		0			
persons (as defined undex section 4958()(1)) and persons described in section 4958()(3)(8) 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	•	2,875,435.	2,127,822.	632,596.	115,017.
persons described in section 4958(c)(3)(B)	6 Compensation not included above, to disqualified				
7 Other salaries and wages 4,740,015, 3,206,695, 864,942, 668,37 8 Pension pian accurate and contributions (include section 401(k) and 403(b) employer contributions). 9 Other employee benefits 748,175, 495,765, 161,797, 90,61 10 Payroll taxes, 445,587, 301,797, 98,613, 45,17 11 Fees for services (non-employees): a Management 0 b Legal 170,859, 844,886, 61,990, 23,98 c Accounting 72,600, 18,150, 54,450, 450, 450, 450, 450, 450, 450					
8 Pension plan accruses and contributions (include section 401(k) and 403(b) employer contributions).  9 Other employee benefits.  748,175.  748,175.  748,175.  7495,765.  161,797.  90,61.  10 Payroll taxes.  445,587.  301,797.  98,613.  45,17  11 Fees for services (non-employees):  a Management  b Legal  170,859.  8 4,886.  61,990.  23,98  c Accounting.  160,949.  110,949.  1014,617.  24,142.  32,19  e Professional fundraising services. See Plat IV. line 17.  f Investment management fees  9 Other. (if lise 11g amount exceeds 10% of line 25, column (A) amount list line 19g expenses on Schedule O).  116,411.  110,844.  5567.  27,300  17126,660.  17126,660.  17126,660.  17126,660.  17126,660.  17126,660.  17126,783.  17126.  17128.  17138.  1714.		0	0.006.605	0.6.40.4.0	
401(k) and 403(b) employer contributions). 627, 873, 403, 737, 124, 424, 99,71 9 Other employee benefits 748,175, 495,765, 161,797, 90,61 10 Payroll taxes . 445,587, 301,797, 98,613, 45,17 11 Fees for services (non-employees): a Management . 0 b Legal . 170,859, 84,886, 61,990, 23,98 c Accounting . 72,600, 18,150, 54,450, . d Lobbying . 160,949, 104,617, 24,142, 32,19 e Professional fundralising services. See Part IV, line 17, 0 g Other, (if time 11g amount exceeds 10% of line 25, column (A) amount List line 11g expenses on Schedule O). 116,411, 110,844, 5,567, 17,304 11 Information technology . 1,126,660, 614,823, 452,337, 59,50 12 Royalties . 0 13 Office expenses . 529,051, 192,288, 309,457, 27,30 14 Information technology . 1,126,660, 614,823, 452,337, 59,50 15 Royalties . 0 16 Occupancy . 319,183, 131,437, 162,202, 25,54 17 Trave . 553,472, 397,836, 76,099, 79,53 18 Payments of travel or entertainment expenses for any federal, state, or local public officials . 0 0 10 Compancy . 1,124,11,1303, 3,911, 17,615, 17,714,1839, 292,960, 878,879, 17,615, 17,714,1839, 292,960, 878,879, 17,615, 17,714,1839, 292,960, 878,879, 17,615, 17,714,1839, 292,960, 878,879, 17,615	7 Other salaries and wages	4,/40,015.	3,206,695.	864,942.	668,378.
9 Other employee benefits		607 072	402 727	104 404	00 710
10   Payroll taxes					
11 Fees for services (non-employees): a Management b Legal					
a Management b Legal		445,587.	301,797.	98,613.	45,1//.
b Legal 170,859, 84,886, 61,990, 23,98 c Accounting 72,600. 18,150. 54,450. d d Lobbying 160,949, 104,617. 24,142, 32,19 e Professional fundraising services. See Part IV, line 17. f f Investment management fees 51,935. 51,935. 51,935.  9 Other. (if line 11g amount exceeds 10% of line 25, column (A) amount list line 19 (expenses on Schedule O). 917,499. 568,322. 223,390. 125,78 12 Advertising and promotion 116,411. 110,844. 5,567. 130 Office expenses 529,051. 192,288. 309,457. 27,30 14 Information technology. 1,126,660. 614,823. 452,337. 59,50 15 Royalties. 0 0 16 Occupancy 319,183. 131,437. 162,202. 25,54 17 Travel 553,472. 397,836. 76,099. 79,53 18 Payments of travel or entertainment expenses for any federal, state, or local public officials 0 0 Conferences, conventions, and meetings 99,933. 28,318. 71,615. 10 10 Interest 5,214. 1,303. 3,911. 11 21 Payments to affiliates 1,1711,839. 292,960. 878,879. 12 22 Depreciation, depletion, and amortization 1,691,451. 1,398,591. 272,640. 20,22 23 Insurance 2,106. 2,104. 2. 11 10 Interest 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O) a  a JA_ PROGRAM_EXPENSES 3,225,522. 3,090,775. 134,734. 1  b IN-KIND_SOFTWARE 395,000. 335,750. 59,250. c  c TRAININGS 610. 300,940. 285,893. 15,047. 610. 610. 610. 610. 610. 610. 610. 610	1 7 7				
C Accounting		170 950	01 006	61 000	22 002
Body   Company				<u> </u>	23,903.
e Professional fundraising services. See Part IV, line 17. f Investment management fees 9 Other. (if line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O). 116,411. 110,844. 5,567. 13 Office expenses 1529,051. 192,288. 309,457. 27,30 14 Information technology. 1,126,660. 614,823. 452,337. 59,50 16 Occupancy. 319,183. 131,437. 162,202. 25,54 17 Travel. 553,472. 397,836. 76,099. 79,53 18 Payments of travel or entertainment expenses for any federal, state, or local public officials on the service of the services. 19 Conferences, conventions, and meetings. 99,933. 28,318. 71,615. 20 Interest. 21 Payments to affiliates. 22 Depreciation, depletion, and amortization. 23 Insurance. 24 Other expenses. Itemize expenses on to covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O) a 1A PROGRAM EXPENSES 3,225,522. 3,090,775. 134,734. 15,734 15,047. e All other expenses. 455,381. 312,378. 107,942. 355,06					32 190
f Investment management fees   51,935.   51,935.		100,313.	101/01/	21/112.	32/130.
Source   Company   Source		51.935.		51.935.	
Advertising and promotion		01/300.		01/300.	
12 Advertising and promotion	·	917,499.	568,322.	223,390.	125,787.
13 Office expenses       529,051       192,288       309,457       27,30         14 Information technology       1,126,660       614,823       452,337       59,50         15 Royalties       0					· · · · · · · · · · · · · · · · · · ·
14 Information technology     1,126,660     614,823     452,337     59,50       15 Royalties     0       16 Occupancy     319,183     131,437     162,202     25,54       17 Travel     553,472     397,836     76,099     79,53       18 Payments of travel or entertainment expenses for any federal, state, or local public officials     0     71,615       19 Conferences, conventions, and meetings     99,933     28,318     71,615       20 Interest     5,214     1,303     3,911       21 Payments to affiliates     1,171,839     292,960     878,879       22 Depreciation, depletion, and amortization     1,691,451     1,398,591     272,640     20,22       23 Insurance     2,106     2,104     2       24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)     3,225,522     3,090,775     134,734     1       b IN-KIND_SOFTWARE     395,000     335,750     59,250       c TRAININGS     172,812     135,475     31,598     5,73       d EVALUATIONS     300,940     285,893     15,047       e All other expenses     455,381     312,378     107,942     35,06		529,051.	192,288.	309,457.	27,306.
16 Occupancy     319,183     131,437     162,202     25,54       17 Travel     553,472     397,836     76,099     79,53       18 Payments of travel or entertainment expenses for any federal, state, or local public officials     0     71,615       19 Conferences, conventions, and meetings     99,933     28,318     71,615       20 Interest     5,214     1,303     3,911       21 Payments to affiliates     1,171,839     292,960     878,879       22 Depreciation, depletion, and amortization     1,691,451     1,398,591     272,640     20,22       23 Insurance     2,106     2,104     2       24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)     3,225,522     3,090,775     134,734     1       b IN-KIND_SOFTWARE     395,000     335,750     59,250       c TRAININGS     172,812     135,475     31,598     5,73       d EVALUATIONS     300,940     285,893     15,047       e All other expenses     455,381     312,378     107,942     35,06		1,126,660.	614,823.	452,337.	59,500.
16 Occupancy     319,183     131,437     162,202     25,54       17 Travel     553,472     397,836     76,099     79,53       18 Payments of travel or entertainment expenses for any federal, state, or local public officials     0     71,615       19 Conferences, conventions, and meetings     99,933     28,318     71,615       20 Interest     5,214     1,303     3,911       21 Payments to affiliates     1,171,839     292,960     878,879       22 Depreciation, depletion, and amortization     1,691,451     1,398,591     272,640     20,22       23 Insurance     2,106     2,104     2       24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)     3,225,522     3,090,775     134,734     1       b IN-KIND_SOFTWARE     395,000     335,750     59,250       c TRAININGS     172,812     135,475     31,598     5,73       d EVALUATIONS     300,940     285,893     15,047       e All other expenses     455,381     312,378     107,942     35,06	15 Royalties	0			
18 Payments of travel or entertainment expenses for any federal, state, or local public officials       0         19 Conferences, conventions, and meetings       99,933       28,318       71,615         20 Interest       5,214       1,303       3,911         21 Payments to affiliates       1,171,839       292,960       878,879         22 Depreciation, depletion, and amortization       1,691,451       1,398,591       272,640       20,22         23 Insurance       2,106       2,104       2         24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)       3,225,522       3,090,775       134,734       1         b IN-KIND SOFTWARE       395,000       335,750       59,250       5,73         c TRAININGS       172,812       135,475       31,598       5,73         d EVALUATIONS       300,940       285,893       15,047         e All other expenses       455,381       312,378       107,942       35,06	16 Occupancy	319,183.	131,437.	162,202.	25,544.
for any federal, state, or local public officials         0           19 Conferences, conventions, and meetings         99,933.         28,318.         71,615.           20 Interest         5,214.         1,303.         3,911.           21 Payments to affiliates         1,171,839.         292,960.         878,879.           22 Depreciation, depletion, and amortization         1,691,451.         1,398,591.         272,640.         20,22           23 Insurance         2,106.         2,104.         2.           24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)         3,225,522.         3,090,775.         134,734.         1           b IN-KIND_SOFTWARE         395,000.         335,750.         59,250.           c TRAININGS         172,812.         135,475.         31,598.         5,73           d EVALUATIONS         300,940.         285,893.         15,047.           e All other expenses         455,381.         312,378.         107,942.         35,06	17 Travel	553,472.	397,836.	76,099.	79,537.
19 Conferences, conventions, and meetings       99,933.       28,318.       71,615.         20 Interest       5,214.       1,303.       3,911.         21 Payments to affiliates       1,171,839.       292,960.       878,879.         22 Depreciation, depletion, and amortization       1,691,451.       1,398,591.       272,640.       20,22         23 Insurance       2,106.       2,104.       2.         24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)       3,225,522.       3,090,775.       134,734.       1         b IN-KIND_SOFTWARE       395,000.       335,750.       59,250.         cTRAININGS       172,812.       135,475.       31,598.       5,73         dEVALUATIONS       300,940.       285,893.       15,047.         e All other expenses       455,381.       312,378.       107,942.       35,06	18 Payments of travel or entertainment expenses				
20   Interest	for any federal, state, or local public officials	0			
21 Payments to affiliates       1,171,839       292,960       878,879         22 Depreciation, depletion, and amortization       1,691,451       1,398,591       272,640       20,22         23 Insurance       2,106       2,104       2         24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)       3,225,522       3,090,775       134,734       1         b IN-KIND SOFTWARE       395,000       335,750       59,250         cTRAININGS       172,812       135,475       31,598       5,73         dEVALUATIONS       300,940       285,893       15,047         e All other expenses       455,381       312,378       107,942       35,06	19 Conferences, conventions, and meetings				
22 Depreciation, depletion, and amortization       1,691,451.       1,398,591.       272,640.       20,22         23 Insurance       2,106.       2,104.       2.         24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)       3,225,522.       3,090,775.       134,734.       1         b IN-KIND SOFTWARE       395,000.       335,750.       59,250.         c TRAININGS       172,812.       135,475.       31,598.       5,73         d EVALUATIONS       300,940.       285,893.       15,047.         e All other expenses       455,381.       312,378.       107,942.       35,06				· · · · · · · · · · · · · · · · · · ·	
2,106.   2,104.   2.					
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)       3,225,522. 3,090,775. 134,734. 1         a JA PROGRAM EXPENSES       3,225,522. 3,090,775. 59,250.         b IN-KIND SOFTWARE       395,000. 335,750. 59,250.         cTRAININGS       172,812. 135,475. 31,598. 5,73         dEVALUATIONS       300,940. 285,893. 15,047.         e All other expenses       455,381. 312,378. 107,942. 35,06					20,220.
above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)  a JA PROGRAM EXPENSES 3,225,522. 3,090,775. 134,734. 1  b IN-KIND SOFTWARE 395,000. 335,750. 59,250.  cTRAININGS 172,812. 135,475. 31,598. 5,73  d EVALUATIONS 300,940. 285,893. 15,047.  e All other expenses 455,381. 312,378. 107,942. 35,06		2,106.	2,104.	۷.	
Inne 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)   a JA PROGRAM EXPENSES   3,225,522. 3,090,775. 134,734. 1     b IN-KIND SOFTWARE   395,000. 335,750. 59,250.     c TRAININGS   172,812. 135,475. 31,598. 5,73     d EVALUATIONS   300,940. 285,893. 15,047.     e All other expenses   455,381. 312,378. 107,942. 35,06	· · · · · · · · · · · · · · · · · · ·				
(A) amount, list line 24e expenses on Schedule O.)         a JA PROGRAM EXPENSES       3,225,522.       3,090,775.       134,734.       1         b IN-KIND SOFTWARE       395,000.       335,750.       59,250.         c TRAININGS       172,812.       135,475.       31,598.       5,73         dEVALUATIONS       300,940.       285,893.       15,047.         e All other expenses       455,381.       312,378.       107,942.       35,06	·				
a JA PROGRAM EXPENSES       3,225,522.       3,090,775.       134,734.       1         b IN-KIND SOFTWARE       395,000.       335,750.       59,250.         c TRAININGS       172,812.       135,475.       31,598.       5,73         dEVALUATIONS       300,940.       285,893.       15,047.         e All other expenses       455,381.       312,378.       107,942.       35,06	· ·				
bIN-KIND SOFTWARE       395,000.       335,750.       59,250.         cTRAININGS       172,812.       135,475.       31,598.       5,73         dEVALUATIONS       300,940.       285,893.       15,047.         e All other expenses       455,381.       312,378.       107,942.       35,06	IN DROCDAM EXPENSES	3.225.522	3.090.775	134.734	13.
cTRAININGS       172,812.       135,475.       31,598.       5,73         dEVALUATIONS       300,940.       285,893.       15,047.         e All other expenses       455,381.       312,378.       107,942.       35,06					
dEVALUATIONS 300,940. 285,893. 15,047. e All other expenses 455,381. 312,378. 107,942. 35,06	ED A THINGS				5,739.
e All other expenses					
					35,061.
25 Total functional expenses. Add lines 1 through 24e   24,314,089.  1,453,77	25 Total functional expenses. Add lines 1 through 24e	24,314,089.	17,980,753.	4,879,559.	1,453,777.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)	<b>26 Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ if following SOP 98-2 (ASC 958-720)	0	, 2,1234	, , , , , , , ,	Eorm <b>990</b> (2013)

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Form 990 (2013) Page **11** 

# Part X Balance Sheet

Cash - non-interest-bearing   Cas	ı a	ונא	Daiance Sheet				
1 Cash - non-interest-bearing	_		Check if Schedule O contains a response or	note to any line in this Pa	rt X		X X
2   Savings and temporary cash investments   3,95,075, 2   6,90,757, 3   2,153,314							
2   Savings and temporary cash investments   335,075, 2   632,797, 3		1			2,864,236.	1	6,205,834.
3 Pledges and grants receivable, net 1,845,527, 3 2,153,331.  4 Accounts receivables from current and former officers, directors, trustees, key employees, and highest compensated employees.  Complete Part II of Schedule L  1 Complete Part II of Schedule L  1 Complete Part II of Schedule L  2 Complete Part II of Schedule L  3 Complete Part II of Schedule L  4 Set John Personal design and section 931(c)(9) controlled general programs and other receivables from other disqualified persons (as defined under section 931(c)(9) controlled general programs and complete part II of Schedule L  3 Complete Part II of Schedule L  4 Complete Part II of Schedule L  5 Complete Part II of Schedule L  6 Loans and other receivable, net  7 Notes and loans receivable, net  8 Investments expectable, net  9 Prepaid expenses and deferred charges  9 Prepaid expenses and deferred charges  9 Prepaid expenses and deferred charges  10 Land, buildings, and equipment: cost or other basis. Complete Part IV of Schedule D  10 Land, buildings, and equipment: cost or other basis. Complete Part IV of Schedule D  10 Land, buildings, and equipment: cost or other basis. Complete Part IV of Schedule D  10 Land, buildings, and equipment: cost or other basis. Complete Part IV of Schedule D  10 Land, buildings, and equipment: cost or other basis. Complete Part IV of Schedule D  10 Land, buildings, and equipment: cost or other basis. Complete Part IV, line 11  10 Land, buildings, and accorded special part IV, line 11  11 Investments - program-related. See Part IV, line 11  12 Control sassets  13 Land, buildings, and accorded expenses.  14 Control sassets  15 Control sassets  16 Control sassets  17 Accounts payable and accorded expenses.  18 Control sassets  19 Deferred revenue  19 Deferred revenue  20 Tax-exempt bond liabilities  21 Control liabilities and liability. Complete Part IV of Schedule D  22 Control liabilities and liability. Complete Part IV of Schedule D  23 Secured mortgages and notes payable to unrelated third parties. ATCH 4  24 Control lia		2	Savings and temporary cash investments		395 <b>,</b> 075.	2	690,757.
A Accounts receivable, net   7,693,926, 4   780,787.		3	Pledges and grants receivable, net		1,845,527.	3	2,153,351.
Security		4	A	1,698,826.	4	780,787.	
Complete Part II of Schedule		5	Loans and other receivables from current and t	former officers, directors,			
Section   Sec			trustees, key employees, and highest co	ompensated employees.			
### 4958(f)(1), persons described in section 4958(c)(3)(8), and contributing employers and sponsoring organizations of section 501c(9) voluntary employers beneficiary organizations (see instructions). Complete Part II of Schedule L			Complete Part II of Schedule L		0	5	0
and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L. 0, 7, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0,		6					
organizations (see instructions). Complete Part II of Schedule L. 0 6 0 7 0 0 7 0 0 8 Inventories for sale or use 9 Prepaid expenses and deferred charges 3,3,326,072, 8 2,807,279. 9 19 Prepaid expenses and deferred charges 337,954, 9 333,185. 103 Land, buildings, and equipment, cost or other basis. Complete Part VI of Schedule D 10a 17,516,937. b Less: accumulated depreciation 10b 13,158,340. 5,697,739, 10c 4,358,597. 111 Investments - pother securities. See Part IV, line 11 0 12 0 12 0 12 13 Investments - other securities. See Part IV, line 11 0 12 0 12 0 14 14 16 17 14 15 0 14 15 0 14 16 17							
7 Notes and loans receivable, net					0	6	0
9 Prepaid expenses and deferred charges   333, 185.     10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D   10a   17, 516, 937.     11 Investments - publicly traded securities   ATCH   3   9,509, 028.   11   7,295,552.     12 Investments - other securities. See Part IV, line 11   0   12   0     13 Investments - program-related. See Part IV, line 11   0   13   0     14 Intangible assets   0   14   0   0     15 Other assets. See Part IV, line 11   0   15   0     16 Total assets. See Part IV, line 11   0   15   0     17 Accounts payable and accrued expenses   4,409,761.   16   24,625,342.     17 Accounts payable and accrued expenses   4,409,761.   17   3,919,577.     18 Grants payable   0   139,720.   19   151,674.     19 Deferred revenue   139,720.   19   151,674.     10 Tax-exempt bond liabilities   0   0   0   0     21 Escrow or custodial account liability. Complete Part IV of Schedule D   1,166,826.   21   773,511.     22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L   0   22   0   0     23 Secured mortgages and notes payable to unrelated third parties ATCH   4   162,999.   23   306,281.     24 Unsecured notes and loans payable to unrelated third parties   0   24   0   0     25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D   0   25   0   0     26 Total liabilities. Add lines 17 through 25.   5,879,306.   26   5,151,043.     27 Unrestricted net assets   0,737,062.   28   7,856,894.     28 Temporarily restricted net assets   9,737,062.   28   7,856,894.     29 Permanently restricted net assets   9,737,062.   28   7,856,894.     20 Total liabilities or capital surplus, or land, building, or equipment fund   31   24   24   24   24   24   24   24   2	ets	7	Notes and loans receivable, net		0	7	0
9 Prepaid expenses and deferred charges   333, 185.     10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D   10a   17, 516, 937.     11 Investments - publicly traded securities   ATCH   3   9,509, 028.   11   7,295,552.     12 Investments - other securities. See Part IV, line 11   0   12   0     13 Investments - program-related. See Part IV, line 11   0   13   0     14 Intangible assets   0   14   0   0     15 Other assets. See Part IV, line 11   0   15   0     16 Total assets. See Part IV, line 11   0   15   0     17 Accounts payable and accrued expenses   4,409,761.   16   24,625,342.     17 Accounts payable and accrued expenses   4,409,761.   17   3,919,577.     18 Grants payable   0   139,720.   19   151,674.     19 Deferred revenue   139,720.   19   151,674.     10 Tax-exempt bond liabilities   0   0   0   0     21 Escrow or custodial account liability. Complete Part IV of Schedule D   1,166,826.   21   773,511.     22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L   0   22   0   0     23 Secured mortgages and notes payable to unrelated third parties ATCH   4   162,999.   23   306,281.     24 Unsecured notes and loans payable to unrelated third parties   0   24   0   0     25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D   0   25   0   0     26 Total liabilities. Add lines 17 through 25.   5,879,306.   26   5,151,043.     27 Unrestricted net assets   0,737,062.   28   7,856,894.     28 Temporarily restricted net assets   9,737,062.   28   7,856,894.     29 Permanently restricted net assets   9,737,062.   28   7,856,894.     20 Total liabilities or capital surplus, or land, building, or equipment fund   31   24   24   24   24   24   24   24   2	ASS	8	Inventories for sale or use		3,326,072.	8	2,807,279.
ther basis. Complete Part VI of Schedule D b Less: accumulated depreciation. 11 Investments - publicity traded securities 12 Investments - other securities. See Part IV. line 11 13 Investments - program-related. See Part IV. line 11 14 Intangible assets 15 Other assets. See Part IV. line 11 15 Other assets. See Part IV. line 11 16 Total assets. Add lines 1 through 15 (must equal line 34) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Tax-exempt bond liabilities 21 Escrow or custodial account liabilities 22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule D 21 Escrow or custodial account liabilities not included on lines 17-24). Complete Part X of Schedule D 22 Other liabilities not included on lines 17-24). Complete Part X of Schedule D 23 Secured mortgages and notes payable to unrelated third parties ATCH 4 24 Unsecured notes and loans payable to unrelated third parties ATCH 4 25 Other liabilities not included on lines 17-24). Complete Part X of Schedule D 26 Total liabilities not included on lines 17-24). Complete Part X of Schedule D 27 Total liabilities not included on lines 17-24). Complete Part X of Schedule D 28 Temporarily restricted net assets 29 Permanently restricted net assets 29 Permanently restricted net assets 30 Capital stock or trust principal, or current funds 31 Paid-in or capital surplus, or land, building, or equipment fund 31 Paid-in or capital surplus, or land, building, or equipment fund 31 Retained earnings, endowment, accumulated income, or other funds 31 Total net assets or fund balances 31 Total net assets or fund balances 32 Total net assets or fund balances 33 Total net assets or fund balances 32 Total net assets or fund balances		9	Prepaid expenses and deferred charges		337,954.	9	333,185.
b Less: accumulated depreciation.   10b   13,158,340.   5,697,739.   10c   4,358,597.   11   Investments - publicly traded securities   ATCH   3   9,509,028.   11   7,295,552.   12   Investments - publicly traded securities   ATCH   3   9,509,028.   11   7,295,552.   12   Investments - program - related. See Part IV, line 11   0   13   0   0   14   10   0   14   10   0   15   0   0   14   10   0   15   0   0   15   0   0   15   0   0   16   Total assets. Add lines 1 through 15 (must equal line 34)   25,674,457.   16   24,625,342.   17   Accounts payable and accrued expenses   4,409,761.   17   3,919,577.   18   Grants payable   0   18   0   0   0   19   Deferred revenue   139,720.   19   151,674.   19   151,674.   19   152,674.   19   151,674.   19   152,		10 a	Land, buildings, and equipment: cost or				
11   Investments - publicly traded securities   ATCH 3   9,509,028. 11   7,295,552.							
11   Investments - publicly traded securities   ATCH 3   9,509,028. 11   7,295,552.		b	Less: accumulated depreciation	10b 13,158,340.			
12   Investments - other securities. See Part IV, line 11		11	Investments - publicly traded securities	ATCH 3	9,509,028.	_	7,295,552.
14		12	Investments - other securities. See Part IV, line 11		0		0
15 Other assets. See Part IV, line 11   0   15   0   16   16   17   16   17   16   17   16   17   16   17   16   17   16   17   17		13	Investments - program-related. See Part IV, line 11		0	_	0
16   Total assets. Add lines 1 through 15 (must equal line 34)   25, 674, 457. 16   24, 625, 342.      17   Accounts payable and accrued expenses   4, 409, 761. 17   3, 919, 577.      18   Grants payable   0   18   0     19   Deferred revenue   139, 720. 19   151, 674.      20   Tax-exempt bond liabilities   0   20   0     21   Escrow or custodial account liability. Complete Part IV of Schedule D   1, 166, 826. 21   773, 511.      22   Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L   0   22   0     23   Secured mortgages and notes payable to unrelated third parties ATCH   4   162, 999. 23   306, 281.      24   Unsecured notes and loans payable to unrelated third parties, and other liabilities (including federal income tax, payables to related third parties, and other liabilities included on lines 17-24). Complete Part X of Schedule D   0   25   0     25   Organizations that follow SFAS 117 (ASC 958), check here		14	Intangible assets		0		0
17			Other assets. See Part IV, line 11		0		0
18   Grants payable     0   18   0   0   19   151,674   .   .   .   .   .   .   .   .   .							
Deferred revenue 139,720. 19 151,674. Tax-exempt bond liabilities 0 0 20 0  Tax-exempt bond liabilities 0 1,166,826. 21 773,511.  Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L 0 22 0  Secured mortgages and notes payable to unrelated third parties ATCH 4 162,999. 23 306,281.  Unsecured notes and loans payable to unrelated third parties ATCH 4 162,999. 23 306,281.  Unsecured notes and loans payable to unrelated third parties, and other liabilities included on lines 17-24). Complete Part X of Schedule D 25 0  Total liabilities. Add lines 17 through 25 5,879,306. 26 5,151,043.  Organizations that follow SFAS 117 (ASC 958), check here X and complete lines 27 through 29, and lines 33 and 34.  Unrestricted net assets 10,058,089. 27 11,617,405.  Temporarily restricted net assets 9,737,062. 28 7,856,894.  Permanently restricted net assets 9,737,062. 28 7,856,894.  Permanently restricted net assets 0 29 0  Organizations that do not follow SFAS 117 (ASC 958), check here 10,058,089. 27 11,617,405.  Total net assets or fund balances 10,058,089. 27 11,617,405.  Total net assets or fund balances 10,058,089. 27 11,617,405.  Total net assets or fund balances 10,058,089. 27 11,617,405.					4,409,761.		3,919,577.
20 Tax-exempt bond liabilities 21 Escrow or custodial account liability. Complete Part IV of Schedule D 22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L 23 Secured mortgages and notes payable to unrelated third parties ATCH 4 24 Unsecured notes and loans payable to unrelated third parties 25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D 26 Total liabilities. Add lines 17 through 25.  27 Unrestricted net assets 28 Temporarily restricted net assets 29 Permanently restricted net assets 29 Permanently restricted net assets 30 Capital stock or trust principal, or current funds 31 Paid-in or capital surplus, or land, building, or equipment fund 32 Retained earnings, endowment, accumulated income, or other funds 31 Total net assets or fund balances 32 Total net assets or fund balances 33 Total net assets or fund balances 34 Total net assets or fund balances 35 Total net assets or fund balances 36 Total net assets or fund balances 37 Total net assets or fund balances 38 Total net assets or fund balances			Grants payable		100 500	_	0
Escrow or custodial account liability. Complete Part IV of Schedule D   1,166,826. 21   773,511.					139,720.	_	151,6/4.
Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L  23 Secured mortgages and notes payable to unrelated third parties ATÇH 4  24 Unsecured notes and loans payable to unrelated third parties  25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D  26 Total liabilities. Add lines 17 through 25.  27 Unrestricted net assets  28 Temporarily restricted net assets  29 Permanently restricted net assets  29 Permanently restricted net assets  30 Capital stock or trust principal, or current funds  31 Paid-in or capital surplus, or land, building, or equipment fund  32 Retained earnings, endowment, accumulated income, or other funds  30 Total net assets or fund balances  29 Interestricted net assets or fund balances  20 Total liabilities.  30 Total net assets or fund balances  31 Paid-in assets or fund balances  32 Total net assets or fund balances  33 Total net assets or fund balances			Tax-exempt bond liabilities		1 166 006		<u> </u>
Secured mortgages and notes payable to unrelated third parties ATCH 4 162,999. 23 306,281.  24 Unsecured notes and loans payable to unrelated third parties. 0 24 0  25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D 25 0  26 Total liabilities. Add lines 17 through 25 5,879,306. 26 5,151,043.  Organizations that follow SFAS 117 (ASC 958), check here	ies	ı			1,166,826.	21	//3,511.
Secured mortgages and notes payable to unrelated third parties ATCH 4 162,999. 23 306,281.  24 Unsecured notes and loans payable to unrelated third parties. 0 24 0  25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D 25 0  26 Total liabilities. Add lines 17 through 25 5,879,306. 26 5,151,043.  Organizations that follow SFAS 117 (ASC 958), check here	e E	22					
Secured mortgages and notes payable to unrelated third parties ATCH 4 162,999. 23 306,281.  24 Unsecured notes and loans payable to unrelated third parties. 0 24 0  25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D 25 0  26 Total liabilities. Add lines 17 through 25 5,879,306. 26 5,151,043.  Organizations that follow SFAS 117 (ASC 958), check here	L.				0	22	0
Unsecured notes and loans payable to unrelated third parties 0 24 0  Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D 0 25 0  Total liabilities. Add lines 17 through 25 5,879,306. 26 5,151,043.  Organizations that follow SFAS 117 (ASC 958), check here complete lines 27 through 29, and lines 33 and 34.  Unrestricted net assets 10,058,089. 27 11,617,405.  Temporarily restricted net assets 9,737,062. 28 7,856,894.  Permanently restricted net assets 9,737,062. 28 7,856,894.  Organizations that do not follow SFAS 117 (ASC 958), check here complete lines 30 through 34.  Capital stock or trust principal, or current funds 30 Paid-in or capital surplus, or land, building, or equipment fund 31 Retained earnings, endowment, accumulated income, or other funds 32 Total net assets or fund balances 19,795,151. 33 19,474,299.		22			162 999		306 281
25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D					102,000.	_	
parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D					O		
of Schedule D		23	· -				
Total liabilities. Add lines 17 through 25. 5,879,306. 26 5,151,043.  Organizations that follow SFAS 117 (ASC 958), check here complete lines 27 through 29, and lines 33 and 34.  Unrestricted net assets 10,058,089. 27 11,617,405.  Temporarily restricted net assets 9,737,062. 28 7,856,894.  Permanently restricted net assets 0 29 0 0  Organizations that do not follow SFAS 117 (ASC 958), check here complete lines 30 through 34.  Capital stock or trust principal, or current funds 30 Paid-in or capital surplus, or land, building, or equipment fund 31 Retained earnings, endowment, accumulated income, or other funds 32 Total net assets or fund balances 19,795,151. 33 19,474,299.			· ·		0	25	0
Organizations that follow SFAS 117 (ASC 958), check here complete lines 27 through 29, and lines 33 and 34.  Unrestricted net assets  Temporarily restricted net assets  Permanently restricted net assets  Organizations that do not follow SFAS 117 (ASC 958), check here complete lines 30 through 34.  Capital stock or trust principal, or current funds  Paid-in or capital surplus, or land, building, or equipment fund  Retained earnings, endowment, accumulated income, or other funds  Total net assets or fund balances  Organizations that follow SFAS 117 (ASC 958), check here and complete lines 30 through 34.		26	Total liabilities. Add lines 17 through 25		5,879,306.		5,151,043.
30 Capital stock or trust principal, or current funds 31 Paid-in or capital surplus, or land, building, or equipment fund 32 Retained earnings, endowment, accumulated income, or other funds 33 Total net assets or fund balances 30 31 31 31 32 32 32 32 32 33 33 32 347474,299.			Organizations that follow SFAS 117 (ASC 958),	check here ▶ X and			
30 Capital stock or trust principal, or current funds 31 Paid-in or capital surplus, or land, building, or equipment fund 32 Retained earnings, endowment, accumulated income, or other funds 33 Total net assets or fund balances 30 31 32 32 33 19,474,299.	Seou	2.7	•		10 050 000	0.7	11 (17 405
30 Capital stock or trust principal, or current funds 31 Paid-in or capital surplus, or land, building, or equipment fund 32 Retained earnings, endowment, accumulated income, or other funds 33 Total net assets or fund balances 30 31 32 32 33 19,474,299.	alaı	1				_	
30 Capital stock or trust principal, or current funds 31 Paid-in or capital surplus, or land, building, or equipment fund 32 Retained earnings, endowment, accumulated income, or other funds 33 Total net assets or fund balances 30 31 31 31 32 32 32 32 32 33 33 32 347474,299.	ä		Pormanantly restricted not assets		9,131,002.	_	7,000,094.
30 Capital stock or trust principal, or current funds 31 Paid-in or capital surplus, or land, building, or equipment fund 32 Retained earnings, endowment, accumulated income, or other funds 33 Total net assets or fund balances 30 31 31 31 32 32 32 32 32 33 33 32 347474,299.	u E	29			U	29	0
	or F			, check here			
	ste						
	SSE	31					
	τÀ		Retained earnings, endowment, accumulated inco	ome, or other funds			
184 7 (10 1000 1 ) ( (6 11 1	Ne		Total net assets or fund balances				
34 Total liabilities and net assets/fund balances	_	34	Total liabilities and net assets/fund balances		25,674,457.	34	24,625,342.

Form 990 (2013) Page **12** 

	0 (2013)					JC 12
Part						
	Check if Schedule O contains a response or note to any line in this Part XI					X
1	Total revenue (must equal Part VIII, column (A), line 12)	1		24,4		
2	Total expenses (must equal Part IX, column (A), line 25)	2		24,3		
3	Revenue less expenses. Subtract line 2 from line 1	3			74,6	
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4		19,7		
5	Net unrealized gains (losses) on investments	5		3	65,0	63.
6	Donated services and use of facilities	6				0
7	Investment expenses	7				0
8	Prior period adjustments	8				0
9	Other changes in net assets or fund balances (explain in Schedule O)	9		- 8	60,5	587.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line					
	33, column (B))	10		19,4	74,2	99.
Part						
	Check if Schedule O contains a response or note to any line in this Part XII					
					Yes	No
1	Accounting method used to prepare the Form 990: Cash X Accrual Other					
	If the organization changed its method of accounting from a prior year or checked "Other," e	xplain	in			
	Schedule O.					
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?			2a		X
	If "Yes," check a box below to indicate whether the financial statements for the year were con	npiled	or			
	reviewed on a separate basis, consolidated basis, or both:					
	Separate basis Consolidated basis Both consolidated and separate basis					
b	Were the organization's financial statements audited by an independent accountant?			2b	Χ	
	If "Yes," check a box below to indicate whether the financial statements for the year were audi					
	separate basis, consolidated basis, or both:					
	Separate basis Consolidated basis Both consolidated and separate basis					
С	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for over-	sight				
	of the audit, review, or compilation of its financial statements and selection of an independent accou	-		2c	Χ	
	If the organization changed either its oversight process or selection process during the tax year, e					
	Schedule O.	'				
3 a	As a result of a federal award, was the organization required to undergo an audit or audits as se	t forth	ı in			
	the Single Audit Act and OMB Circular A-133?			3a		Х
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not und	ergo	the			
	required audit or audits, explain why in Schedule O and describe any steps taken to undergo such au	_		3b		

#### SCHEDULE A (Form 990 or 990-EZ)

# **Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

201

Open to Public Inspection

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service ► Attach to Form 990 or Form 990-EZ. ►Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Name of the organization

JUNIOR ACHIEVEMENT USA

Employer identification number

84-1267604

Pa	rt I	Reason for Publ	ic Charity Statu	ıs (All organizations mu	st con	nplete	this pa	art.) Se	e instr	uctions		7001		
				cause it is: (For lines 1 th		•								
1		·		association of churches	-		-		-	_				
2				(1)(A)(ii). (Attach Schedul					-,(-,,(-,					
3				service organization descr		sectio	n 170/k	o)(1)( <b>A</b> )	(iii)					
4		•		perated in conjunction wi			-			n 170/k	5)(1)(4	A)(iii)	Enter	the
7		hospital's name, cit		ociated iii oonjanotion w	tii a ii	озріта	1 40501	ibca iii	300110		,,,,,,	٠,()٠	Lintoi	tiic
5				enefit of a college or univ	oreity		or one	arated b		vernme	ntal u	nit da	cribe	d in
3		section 170(b)(1)(A		<del>-</del>	CISILY	o wii e u	i di dpi	sialeu i	by a go	verriirie	illai u	IIIL UE	SCIIDE	u III
6				ran ii.) t or governmental unit des	oribod	in coof	ion 17(	)/b\/4\/	A \ (1/2)					
6	V		-	=						it on fr	+ b		ral n	مناطب
7	X	=	=	ves a substantial part of it	s supp	ort iro	ını a go	vernine	illai ui	iit or ire	וווע וווע	e gene	rarpi	ublic
				. (Complete Part II.)		<b>3</b> ( 11 3								
8	$\vdash$			ion 170(b)(1)(A)(vi). (Com	•			(-1)-			1- !	<b>6</b>		
9		_	-	res: (1) more than 331/3 %							-		-	
		•		s exempt functions - subj			-							
				ome and unrelated busi						n 511	tax) t	rom b	usine	sses
				ne 30, 1975. See <b>section</b>			•		,					
10	Ш	-	•	ated exclusively to test for	•	-				-				
11		-	-	erated exclusively for the			-							
				upported organizations de					-				e sec	tion
				bes the type of supporting	_						-			
		a Type I		c Type III-Function	•	•			• •	I-Non-fu			•	
e	;	-	=	ne organization is not con			-	-	-			-		
			<del>-</del>	d other than one or more	publicl	y supp	orted o	rganıza	itions d	escribe	dıns	ection	509(8	a)(1)
		or section 509(a)(2					_	_		_				
f				en determination from th							e III s	upport	ing	
		organization, check	this box											
ć	3	=	006, has the orga	anization accepted any gif	or co	ntrib uti	on from	n any of	the					
		following persons?									•			
				ctly controls, either alone									Yes	No
				f the supported organizati								11g(i)		
				scribed in (i) above?								11g(ii)	_	
				son described in (i) or (ii) a								11g(iii)		
h	1	Provide the following	ng information abo	out the supported organization	ation(s)									
		ame of supported	(ii) EIN	(iii) Type of organization (described on lines 1-9	(iv)	ls the zation in		ou notify		sthe	(vii) A	mount		etary
		organization		above or IRC section	col. (i)	listed in		anization ) of your		zation in rganized		suppo	оπ	
				(see instructions))		verning ment?	sup	ort?	in the	Ŭ.S.?				
					Yes	No	Yes	No	Yes	No				
(A)														
( <u>^</u> )														
(B)														
(C)														
<del>(0)</del>														
(D)														
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									1					
(E)														
(E)														

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2013

Schedule A (Form 990 or 990-EZ) 2013 Page **2** 

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Sec	tion A. Public Support						
Cale	ndar year (or fiscal year beginning in)	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
1	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	22,132,445.	21,021,882.	12,116,945.	20,020,733.	9,619,828.	84,911,833.
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0
3	The value of services or facilities furnished by a governmental unit to the organization without charge						0
4	Total. Add lines 1 through 3	22,132,445.	21,021,882.	12,116,945.	20,020,733.	9,619,828.	84,911,833.
5	The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount						
	shown on line 11, column (f)						33,308,582.
6	Public support. Subtract line 5 from line 4.						51,603,251.
	tion B. Total Support	( ) 0000	(1) 0040	( ) 0044	( D 0040	( ) 0040	
_	ndar year (or fiscal year beginning in)	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
7 8	Amounts from line 4	22,132,445.	21,021,882.	12,116,945.	20,020,733.	9,619,828.	84,911,833.
9	Net income from unrelated business activities, whether or not the business is regularly carried on	222,243.	190,132.	263,374.	215,033.	200,203.	1,157,087.
10	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						0_
11	Total support. Add lines 7 through 10						86,068,920.
12	Gross receipts from related activities, etc. (	see instructions) .				12	91,322,090.
13	<b>First five years.</b> If the Form 990 is f organization, check this box and <b>stop here</b>						
Sec	tion C. Computation of Public Sup	•	•		ı		
14	Public support percentage for 2013 (li		-			14	59.96%
15	Public support percentage from 2012					15	61.99%
16a	331/3% support test - 2013. If the o						
	this box and <b>stop here</b> . The organizati						
b	331/3% support test - 2012. If the						
	check this box and <b>stop here</b> . The org						
17a	10%-facts-and-circumstances test - 1	-					
	10% or more, and if the organization					· · · · · · · · · · · · · · · · · · ·	•
	Part IV how the organization meets			=	· ·	•	apported
	organization						• 🗀
b	10%-facts-and-circumstances test - 1	_					
	15 is 10% or more, and if the organization						
	Explain in Part IV how the organization						publicly
10	supported organization  Private foundation. If the organization						• 🗀
18	_						
	instructions	<del></del>				· · · · · · · · · ·	<u> r 🗀 </u>

Schedule A (Form 990 or 990-EZ) 2013

# Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

<u></u>	tion A. Dublic Compant				•	,	
	tion A. Public Support	(a) 2009	(b) 2010	(a) 2011	(4) 2012	(a) 2013	(f) Total
_	ndar year (or fiscal year beginning in)	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
1	Gifts, grants, contributions, and membership fees						
	received. (Do not include any "unusual grants.")						
2	Gross receipts from admissions, merchandise						
	sold or services performed, or facilities						
	furnished in any activity that is related to the						
	organization's tax-exempt purpose						
3	Gross receipts from activities that are not an						
	unrelated trade or business under section 513						
4	Tax revenues levied for the						
	organization's benefit and either paid						
	to or expended on its behalf						
5	The value of services or facilities						
	furnished by a governmental unit to the						
	organization without charge						
6	Total. Add lines 1 through 5						
7 a	Amounts included on lines 1, 2, and 3						
	received from disqualified persons						
b	Amounts included on lines 2 and 3						
	received from other than disqualified persons that exceed the greater of \$5,000						
	or 1% of the amount on line 13 for the year						
С	Add lines 7a and 7b						
8	Public support (Subtract line 7c from						
	line 6.)						
Sec	tion B. Total Support						
Cale	ndar year (or fiscal year beginning in) 🕨	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
9	Amounts from line 6						
10 a	Gross income from interest, dividends,						
	payments received on securities loans, rents, royalties and income from similar						
	sources						
b	Unrelated business taxable income (less						
	section 511 taxes) from businesses						
	acquired after June 30, 1975						
c	Add lines 10a and 10b						
11	Net income from unrelated business						
•	activities not included in line 10b,						
	whether or not the business is regularly						
40	Carried on						
12	Other income. Do not include gain or						
	loss from the sale of capital assets (Explain in Part IV.)						
13	Total support. (Add lines 9, 10c, 11,						
	and 12.)						
14	First five years. If the Form 990 is for	the organization	n'e firet eacond	third fourth or	fifth tay year a	e a section 501	(c)(3)
1-7	organization, check this box and stop here.	=					
Sec	tion C. Computation of Public Sup						
15	Public support percentage for 2013 (line 8,			mn (f))		15	%
16	Public support percentage from 2012 Sche					16	
	tion D. Computation of Investmen					10	70
<u>360</u> 17	Investment income percentage for 2013 (lin			I3 column (f))		17	%
18	Investment income percentage for 2013 (IIII						<del>%</del>
						18   331/3 %	
ıøa	33 1/3 % support tests - 2013. If the org						
h	17 is not more than 331/3%, check thi 331/3% support tests - 2012. If the orga						
b	line 18 is not more than 331/3 %, check						
20	Private foundation. If the organization of		=				
20	uic organization t	AIG HOL CHECK	a box on mie	17, 10a, OI 18b	, oncor una bu	27 ana 366 m3ti	a otions >

JSA 3E1221 1.000

Schedule A (Form 990 or 990-EZ) 2013

Part IV Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

#### Schedule B

(Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

Employer identification number

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

JUNIOR ACHIEVEMENT USA 84-1267604 Organization type (check one): Filers of: Section: X Form 990 or 990-EZ 501(c)(3 ) (enter number) organization 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation 527 political organization Form 990-PF 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. General Rule For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. Special Rules For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or 

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Employer identification number 84 - 1267604

Part I	Contributors (see instructions). Use duplicate copies of Par	t I if additional space is nee	ded.
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1_		\$400,000.	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2_		\$ <u>310,000</u> .	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3_		\$946,556.	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
4		\$1,769,674.	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
_ 5		\$250,000.	Person  Payroll  Noncash  (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
6 _		\$205,000.	Person Payroll Noncash (Complete Part II for noncash contributions.)

Employer identification number 84-1267604

Part	Contributors (see instructions). Use duplicate copies of Pa	irt i ir additionai space is nee	ded.
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7 _		\$233,410.	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
8 _		\$926,366.	Person  Payroll  Noncash  (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
9-		\$258,227.	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
10		\$1,500,000.	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
_ <u>_ 11</u> _		\$200,000.	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)

Employer identification number

84-1267604

# Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
8 -	SOFTWARE UTILIZED ON JA USA SERVERS AND DESKTOP COMPUTERS AND LOCAL AREA COMPUTERS.		
		\\$460,616.	_VAR
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		   \$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		   \$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		   \$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		   \$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received

Employer identification number

84-1267604

Part III	Exclusively religious, charitable, etc that total more than \$1,000 for the y							
	For organizations completing Part III, contributions of \$1,000 or less for th	e year. (Enter this in	formation once. S	charitable, etc., ee instructions.) ► \$				
	Use duplicate copies of Part III if addit	ional space is need	ed					
(a) No. from Part I	(b) Purpose of gift	(c) Use	of gift	(d) Description of how gift is held				
		(e) Transf	er of gift					
	Transferee's name, address, at	nd ZIP + 4	Relatio	nship of transferor to transferee				
(a) No. from Part I	(b) Purpose of gift	(c) Use	of gift	(d) Description of how gift is held				
		(e) Transf	er of gift					
	Transferee's name, address, ai	nd ZIP + 4	Relatio	nship of transferor to transferee				
(a) No. from Part I	(b) Purpose of gift	(c) Use	of gift	(d) Description of how gift is held				
	(e) Transfer of gift							
	Transferee's name, address, ai	nd ZIP + 4	Relatio	nship of transferor to transferee				
(a) No. from Part I	(b) Purpose of gift	(c) Use	of gift	(d) Description of how gift is held				

(e) Transfer of gift

Relationship of transferor to transferee

Transferee's name, address, and ZIP + 4

#### **SCHEDULE C** (Form 990 or 990-EZ)

# **Political Campaign and Lobbying Activities**

For Organizations Exempt From Income Tax Under section 501(c) and section 527

**Open to Public** 

Department of the Treasury Internal Revenue Service

Complete if the organization is described below. Attach to Form 990 or Form 990-EZ. ▶ Information about Schedule C (Form 990 or 990-EZ) and its See separate instructions. instructions is at www.irs.gov/form990.

Inspection

OMB No. 1545-0047

If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

	Section 501(c)(4), (5), or (6) org	anizations: Complete Part III	IX) OF FOIR 990-EZ, FA	it v, lille 35c (Proxy Tax), ti	ien
	e of organization	unizations. Complete Fart III.		Employer identi	fication number
JUN	NIOR ACHIEVEMENT USA			84-12	67604
Pa	rt I-A Complete if the o	organization is exempt under	section 501(c) or	is a section 527 orgai	nization.
1		organization's direct and indirect p			
2	Political expenditures			▶\$	
3					
Par	rt I-B Complete if the o	organization is exempt under s	section 501(c)(3).		
1	Enter the amount of any exc	cise tax incurred by the organizatio	n under section 495	5 ▶ \$	
2	Enter the amount of any exc	cise tax incurred by organization m	anagers under secti	on 4955 ▶ \$	
3	If the organization incurred	a section 4955 tax, did it file Form	4720 for this year?		Yes No
4a	Was a correction made?				Yes No
b	If "Yes," describe in Part IV.				
Pai	rt I-C Complete if the c	organization is exempt under	section 501(c), ex	cept section 501(c)(3	).
1	Enter the amount directly e	expended by the filing organization	n for section 527 ex	xempt function	
	activities			▶\$	
2		ng organization's funds contributed			
	527 exempt function activiti	ies		▶\$	
3		enditures. Add lines 1 and 2. En			
4	Did the filing organization fil	e Form 1120-POL for this year?			Yes No
5		and employer identification numb			
		ts. For each organization listed, en tributions received that were prom			
		nd or a political action committee (I			
	(a) Name	(b) Address	(c) EIN	(d) Amount paid from	(e) Amount of political
	(u) Hame	(b) / (d) 035	(0) 2	filing organization's	contributions received and
				funds. If none, enter -0	promptly and directly
					delivered to a separate
					political organization. If none, enter -0
					,
(1)					
(0)					
(2)		<u> </u>			
(2)					
(3)		<u> </u>			
(4)					
(4)					
(5)					
(3)			•		
(6)					
(0)					

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule C (Form 990 or 990-EZ) 2013

Pa	art II-A Complete if the organizati section 501(h)).	on is exempt under section 501(c)(3) and	filed Form 5768 (elec	tion under
Α		belongs to an affiliated group (and list in Pa enses, and share of excess lobbying expend		oup member's
В	Check ► if the filing organization	checked box A and "limited control" provision	ons apply.	
		ying Expenditures	(a) Filing	(b) Affiliated
	(The term "expenditures" m	eans amounts paid or incurred.)	organization's totals	group totals
1 a	Total lobbying expenditures to influence	ce public opinion (grass roots lobbying)		
k	b Total lobbying expenditures to influence	ce a legislative body (direct lobbying)	160,949.	
C	Total lobbying expenditures (add lines	1a and 1b)	160,949.	
C	d Other exempt purpose expenditures .		24,153,140.	
e		dd lines 1c and 1d)	24,314,089.	
f	Lobbying nontaxable amount. Enter	the amount from the following table in both		
	columns.		1,000,000.	
	If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:		
	Not over \$500,000	20% of the amount on line 1e.		
	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.		
	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.		
	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.		
	Over \$17,000,000	\$1,000,000.		
ç	g Grassroots nontaxable amount (enter	25% of line 1f)	250,000.	
ŀ	h Subtract line 1g from line 1a. If zero or	r less, enter -0-	0	0
i	Subtract line 1f from line 1c. If zero or	less, enter -0-	0	0
j		o on either line 1h or line 1i, did the organiz		
	reporting section 4911 tax for this yea	r?		Yes No
		4-Year Averaging Period Under Section 501(h)		

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f on page 4.)

	Lobbying Expen	ditures During 4-Ye	ar Averaging Period		
Calendar year (or fiscal year beginning in)	(a) 2010	( <b>b)</b> 2011	(c) 2012	( <b>d)</b> 2013	(e) Total
2a Lobbying nontaxable amount	1,000,000.	1,000,000.	1,000,000.	1,000,000.	4,000,000.
<b>b</b> Lobbying ceiling amount (150% of line 2a, column (e))					6,000,000.
c Total lobbying expenditures	164,990.	178,529.	164,428.	160,949.	668,896.
<b>d</b> Grassroots nontaxable amount	250,000.	250,000.	250,000.	250,000.	1,000,000.
e Grassroots ceiling amount (150% of line 2d, column (e))					1,500,000.
f Grassroots lobbying expenditures					
	•			0 1 1 1 0 /5	000 000 E3\ 2013

Schedule C (Form 990 or 990-EZ) 2013

Schedule C (Form 990 or 990-EZ) 2013

During the legislation, referendum a Volunteers' b Paid staff o	" response to lines 1a through 1i below, provide in Part IV a detailed be lobbying activity.  year, did the filing organization attempt to influence foreign, national, state or local including any attempt to influence public opinion on a legislative matter or	Yes	No	,	
During the legislation, referendum Volunteers'	year, did the filing organization attempt to influence foreign, national, state or local including any attempt to influence public opinion on a legislative matter or				mount
legislation, referendum Volunteers' Paid staff o	including any attempt to influence public opinion on a legislative matter or				
referendum a Volunteers' b Paid staff o					
<ul><li>Volunteers'</li><li>Paid staff o</li></ul>	through the use of				
Paid staff o					
	r management (include compensation in expenses reported on lines 1c through 1i)?	-			
Media adve					
Mailings to	ertisements? members, legislators, or the public?				
Publication	members, legislators, or the public? s, or published or broadcast statements?				
Grants to o	ther organizations for lobbying purposes?				
Direct cont	act with legislators, their staffs, government officials, or a legislative body?				
Rallies, der	nonstrations, seminars, conventions, speeches, lectures, or any similar means?				
Other activ	ties?				
	ines 1c through 1i				
	vities in line 1 cause the organization to be not described in section 501(c)(3)?				
	er the amount of any tax incurred under section 4912				
	er the amount of any tax incurred by organization managers under section 4912				
	organization incurred a section 4912 tax, did it file Form 4720 for this year?	( ) ( = )		41	
	implete if the organization is exempt under section 501(c)(4), section 501	(c)(5)	, or s	ection	
50	1(c)(6).				Yes
Were subs	antially all (90% or more) dues received nondeductible by members?			Г	1
	anization make only in-house lobbying expenditures of \$2,000 or less?	• • •		⊢	2
	anization agree to carry over lobbying and political expenditures from the prior year?				3
	mplete if the organization is exempt under section 501(c)(4), section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No,"				ine 3 is
	swered "Yes."	• • • •	,		,
Dues, asse	ssments and similar amounts from members			1	
	2(e) nondeductible lobbying and political expenditures (do not include amou				
political ex	penses for which the section 527(f) tax was paid).				
	r			2a	
	om last year			2b	
				2c	
	amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) du	-		3	
	were sent and the amount on line 2c exceeds the amount on line 3, what portion				
	s the organization agree to carryover to the reasonable estimate of nondeductible l	-	- 1	4	
	l expenditure next year?			4	
				<b>5</b>	
Part IV Su	ount of lobbying and political expenditures (see instructions)			5	

Schedule C (Form 990 or 990-EZ) 2013 Page 4

Part IV Supplemental Information (continued)

### **SCHEDULE D** (Form 990)

# Supplemental Financial Statements ► Complete if the organization answered "Yes," to Form 990,

Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

Name of the organization

► Attach to Form 990. ▶ Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

		organization	Employer Identification number
		ACHIEVEMENT USA	84-1267604
Par	t I	Organizations Maintaining Donor Advised Funds or Other Similar Funds or Ac Complete if the organization answered "Yes" to Form 990, Part IV, line 6.	counts.
		(a) Donor advised funds	(b) Funds and other accounts
1	Tota	I number at end of year	
2	Agg	regate contributions to (during year)	
3		regate grants from (during year)	
4		regate value at end of year	
5		the organization inform all donors and donor advisors in writing that the assets held in do	onor advised
		s are the organization's property, subject to the organization's exclusive legal control?	
6		the organization inform all grantees, donors, and donor advisors in writing that grant funds	
		for charitable purposes and not for the benefit of the donor or donor advisor, or for any or	
		erring impermissible private benefit?	
Par	t II	Conservation Easements. Complete if the organization answered "Yes" to Form	990, Part IV, line 7.
1		ose(s) of conservation easements held by the organization (check all that apply).	,
		Preservation of land for public use (e.g., recreation or education)	an historically important land area
			a certified historic structure
		Preservation of open space	
2	Com	plete lines 2a through 2d if the organization held a qualified conservation contribution in th	ne form of a conservation
		ement on the last day of the tax year.	
			Held at the End of the Tax Year
а	Tota	I number of conservation easements	2a
b			2b
С			2c
d	Num	ober of conservation easements included in (c) acquired after 8/17/06, and not on a	
	histo	oric structure listed in the National Register	2d
3		ber of conservation easements modified, transferred, released, extinguished, or terminate	ed by the organization during the
	taxy	/ear ▶	
4		ber of states where property subject to conservation easement is located ▶	
5		s the organization have a written policy regarding the periodic monitoring, inspection, hand	
	viola	tions, and enforcement of the conservation easements it holds?	Yes No
6	Staf	f and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easer	ments during the year
	▶_		
7	Amo	ount of expenses incurred in monitoring, inspecting, and enforcing conservation easements	s during the year
	▶\$		
8	Doe	s each conservation easement reported on line 2(d) above satisfy the requirements of sect	ion 170(h)(4)(B)
	(i) a	nd section 170(h)(4)(B)(ii)?	Yes No
9		art XIII, describe how the organization reports conservation easements in its revenue and e	
	bala	nce sheet, and include, if applicable, the text of the footnote to the organization's financial	statements that describes the
	orga	nization's accounting for conservation easements.	
Par	t III	Organizations Maintaining Collections of Art, Historical Treasures, or Other S Complete if the organization answered "Yes" to Form 990, Part IV, line 8.	Similar Assets.
1a	If the	· · · · · · · · · · · · · · · · · · ·	venue statement and balance sheet
	work	e organization elected, as permitted under SFAS 116 (ASC 958), not to report in its recs of art, historical treasures, or other similar assets held for public exhibition, educa	ition, or research in furtherance of
		ic service, provide, in Part XIII, the text of the footnote to its financial statements that descr	
b		e organization elected, as permitted under SFAS 116 (ASC 958), to report in its rev ss of art, historical treasures, or other similar assets held for public exhibition, educa	
		ic service, provide the following amounts relating to these items:	and the recognition of the farmer and the
		Revenues included in Form 990, Part VIII, line 1	▶ \$
	(ii) A	Assets included in Form 990, Part X	<b>&gt;</b> \$
2	lf th	e organization received or held works of art, historical treasures, or other similar as	sets for financial gain provide the
_		wing amounts required to be reported under SFAS 116 (ASC 958) relating to these items:	and the state of t
а		enues included in Form 990, Part VIII, line 1	<b>▶</b> \$
b		ets included in Form 990, Part X	

Schedule D (Form 990) 2013

 Schedule D (Form 990) 2013
 Page 2

Par	rt III Organizations Maintainin	g Collections of	Art, Hist	torical T	reasure	es, (	or Oth	ier Similai	Asse	ets (co	ntinu	ed)
3	Using the organization's acquisition collection items (check all that apply		other recor	ds, checl	k any of	f the	follow	ing that are	e a sig	nificant	use (	of its
а	Public exhibition		d	Loan	or excha	nge	prograr	ns				
b	Scholarly research		е	Other								
С	Preservation for future genera	ations										
4	Provide a description of the organi	zation's collections	and expla	ain how t	they furt	ther	the org	ganization's	exemp	t purpo	se in	Part
	XIII.											
5	During the year, did the organization	n solicit or receive o	lonations c	of art, hist	orical tre	easui	res, or o	other simila	r			_
	assets to be sold to raise funds rathe	er than to be mainta	ained as pa	art of the	organiza	tion'	s collec	tion?		Yes		No
Par	rt IV Escrow and Custodial Arr or reported an amount on			ne organ	ization	ansv	wered	"Yes" to Fo	orm 99	00, Part	IV, li	ne 9,
1a	Is the organization an agent, trustee included on Form 990, Part X?			-						Yes	X	No
b	If "Yes," explain the arrangement in	Part XIII and compl	ete the foll	owing tab	ole:							_
								Am	ount			
С	5 5					1c						
d	Additions during the year				[	1d						
е	Distributions during the year					1e						
f	Ending balance											
2a	3	ount on Form 990, I	⊃art X, line	21?						X Yes	L	No
b	If "Yes," explain the arrangement in										Х	
Par	rt V Endowment Funds. Comp							· · · · · · · · · · · · · · · · · · ·				
		(a) Current year	(b) Pric		(c) Two			(d) Three yea		(e) Fou		
	Beginning of year balance	10,997,398.		3,291.				10,556,				<u>,115</u> .
b		5,055,770.	13,03	9,610.	3,7	735,	638.	7,417	<u>,119.</u>	6,	832	<u>,776</u> .
С	Net investment earnings, gains,											
	and losses	241,484.	11	4 <b>,</b> 175.		48,	303.	187	<b>,</b> 683.		115	<u>,655</u> .
d	Grants or scholarships											
е	'											
	and programs	7,104,029.	8,34	9,678.	7,7	788,	309.	7,963	<u>,858.</u>	9,	784	<u>,831</u> .
	Administrative expenses											
g	End of year balance	9,190,623.			1		291.	10,197,	,659 <u>.</u>	10,	556,	,715.
2	Provide the estimated percentage o			e (line 1g,	column	(a))	held as:					
a	Board designated or quasi-endowme		_% _									
b	Permanent endowment											
С	Temporarily restricted endowment		000/									
٥-	The percentages in lines 2a, 2b, and	•		. 4 4 4	ماما مدم	ما ما	ما ممام ما	latava d fav tl				
3a	Are there endowment funds not in the	ne possession of tr	ie organiza	ation that	are neic	ı and	admin	iisterea for tr	ie			
	organization by:									0 (1)	Yes	No
	(i) unrelated organizations									3a(i)		X
h	(ii) related organizations If "Yes" to 3a(ii), are the related organizations									3a(ii)		X
	Describe in Part XIII the intended us		•							3b		
4			on s endo	willellt lui	ius.							
Par	rt VI Land, Buildings, and Equip Complete if the organization	oment. ion answered "Ye	s" to Forn	n 990. P	art IV. li	ine 1	1a. Se	e Form 99	0. Par	rt X. line	10.	
	Description of property	(a) Cost or	other basis	(b) Cost of	or other bas		( <b>c</b> ) Acc	umulated		( <b>d)</b> Book v		
1a	Land	(in ves	tment)	· ·	other) 260,73		depre	eciation		1 0	60 '	730.
та b	Buildings			<b>i</b>	20,73		3 E	66,312.				159.
	Leasehold improvements			4,1		⊥ •	٥,٥	00,314.			J4,.	⊥ J y •
Q C	· · · · · · · · · · · · · · · · · · ·			1 0	103 22	$\overline{}$	<i>(</i> -	68,808.		າ	5/1	522
d	Equipment				12 40	_		23,220.				522.
e Tota	al. Add lines 1a through 1e. (Column		1 000 Po#		12,40							186.
uld	n. Auu iiiles ta liilougii te. (Colullii) i	(u) IIIusi <del>e</del> quai F0III	ı əəu, rall	$\Lambda$ , coluilli	I(D), $IIII$	<del>∪</del> 10(	·/·/	🖊		4,3	00,	J D 1 .

Schedule D (Form 990) 2013 Page 3

Part VII	Investments - Other Securities.		
	Complete if the organization answered	"Yes" to Form 990	, Part IV, line 11b. See Form 990, Part X, line 12.
	(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financia	Il derivatives		
(2) Closely-	held equity interests		
(3) Other			
(A)			
(B)			
<u>(C)</u>			
(D)			
(E)			
<u>(F)</u>			
(H)			
	(b) must equal Form 990, Part X, col. (B) line 12.)		
Part VIII	Investments - Program Related.		
i dit viii		"Yes" to Form 990	, Part IV, line 11c. See Form 990, Part X, line 13.
	(a) Description of investment	(b) Book value	(c) Method of valuation:
	( , = =================================	( )	Cost or end-of-year market value
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
	(b) must equal Form 990, Part X, col. (B) line 13.)		
Part IX	Other Assets.	"Voo" to Form 000	Part IV line 11d See Form 000 Part V line 15
			, Part IV, line 11d. See Form 990, Part X, line 15.
(1)	(a)	Description	(b) Book value
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
	ımn (b) must equal Form 990, Part X, col. (B) l	ine 15.)	<b>&gt;</b>
Part X	Other Liabilities. Complete if the organization answered line 25.	l "Yes" to Form 990	, Part IV, line 11e or 11f. See Form 990, Part X,
1.	(a) Description of liability	(b) Book valu	e
	al income taxes	( , ===================================	
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
Total. (Colum	n (b) must equal Form 990, Part X, col. (B) line 25.)	<b>•</b>	
	r uncertain tax positions. In Part XIII, provide the		e organization's financial statements that reports the

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Schedule D (Form 990) 2013 Page **4** 

Part	Reconciliation of Revenue per Audited Financial Statements With Revenue per Return Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.	n.	
1	Total revenue, gains, and other support per audited financial statements	1	26,814,658.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:	-	
а	Net unrealized gains on investments 2a 365,063.		
b	Donated services and use of facilities 2b 42,512.		
С	Recoveries of prior year grants 2c		
d	Other (Describe in Part XIII.) 2d 5,308,444.		
е	Add lines 2a through 2d	2e	5,716,019.
3	Subtract line 2e from line 1	3	21,098,639.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
а	Investment expenses not included on Form 990, Part VIII, line 7b 4a		
b	Other (Describe in Part XIII.)  4b 3,390,122.		
С	Add lines 4a and 4b	4c	3,390,122.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	24,488,761.
Part	Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.	ırn.	
1	Total expenses and losses per audited financial statements	1	26,274,923.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
а	Donated services and use of facilities 2a 42,512.		
b	Prior year adjustments 2b		
С	Other losses   2c		
d	Other (Describe in Part XIII.)  2d 5,308,444.		- 0-0 0-0
e	Add lines 2a tillough 2u	2e	5,350,956.
3	Subtract line 2e from line 1	3	20,923,967.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a b	Investment expenses not included on Form 990, Part VIII, line 7b  Other (Describe in Part XIII.)  4a  3,390,122.		
C	Add lines 4e and 4h	4.0	3,390,122.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	4c 5	24,314,089.
	XIII Supplemental Information.		21/011/0001
Provid	e the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part III, lines 1b and 2b; Part		
2; Par	t XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional inforr	nation	•
SEE	PAGE 5		

JSA 3E1271 1.000

TRUST, ESCROW, AND CUSTODIAL ARRANGEMENTS

PART IV, LINE 2B

THE ORGANIZATION ASSISTS ITS AREAS IN SETTING UP THEIR OWN ORGANIZATIONS TO ADMINISTER JUNIOR ACHIEVEMENT PROGRAMS. THE ORGANIZATION HOLDS FUNDS ON BEHALF OF CERTAIN MEMBERS FOR THEIR U.S. EXPENSES. THESE ARE INCLUDED IN CASH AND INVESTMENTS ON THE STATEMENTS OF FINANCIAL POSITION AND TOTAL \$491,430 AND \$536,081, RESPECTIVELY AS OF JUNE 30, 2014.

INTENDED USE OF THE ORGANIZATION'S ENDOWMENT FUNDS

PART V, LINE 4

TEMPORARILY RESTRICTED FUNDING AND GRANTS HAVE BEEN DONOR RESTRICTED FOR SPECIFIC PURPOSES OR SPECIFIED TIME FRAMES. RESTRICTIONS ARE FOR THE DEVELOPMENT OF VARIOUS TYPES OF CURRICULUM: AFTER SCHOOL, ONLINE PROGRAMS, ETHICS CURRICULUM, AND PERSONAL FINANCIAL LITERACY PROGRAMS. GRANTS PROVIDE LEADERSHIP, MARKETING AND AWARENESS, AND SCHOLARSHIP AWARDS.

UNCERTAIN TAX POSITIONS

PART X, LINE 2

MANAGEMENT HAS EVALUATED THEIR INCOME TAX POSITIONS UNDER THE GUIDANCE INCLUDED IN ASC 740. BASED ON THEIR REVIEW, MANAGEMENT HAS NOT IDENTIFIED ANY MATERIAL UNCERTAIN TAX POSITIONS TO BE RECORDED OR DISCLOSED IN THE FINANCIAL STATEMENTS.

Part XIII Supplemental Information (continued)

OTHER REVENUE ON BOOKS, NOT ON RETURN

PART XI, LINE 2D

COST OF GOODS SOLD RECLASSED FROM EXPENSE

AND NETTED AGAINST REVENUE

5,308,444

OTHER REVENUE ON RETURN, NOT ON BOOKS

PART XI, LINE 4B

DESIGNATED CONTRIBUTIONS TO US JA OFFICES AND

MEMBER NATIONS TREATED AS AGENCY TRANSACTIONS

FOR FINANCIAL STATEMENT PURPOSES

3,338,187\*

INVESTMENT MANAGEMENT FEES NOT INCLUDED FOR

FINANCIAL STATEMENT PURPOSES, BUT RECOGNIZED FOR

TAX PURPOSES 51,935

TOTAL 3,390,122

OTHER EXPENSES ON BOOKS, NOT ON RETURN

PART XII, LINE 2D

COST OF GOODS SOLD RECLASSED FROM EXPENSE

AND NETTED AGAINST REVENUE 5,308,444

### Part XIII Supplemental Information (continued)

OTHER EXPENSES ON RETURN, NOT ON BOOKS

PART XII, LINE 4B

DESIGNATED CONTRIBUTIONS TO US JA OFFICES AND

MEMBER NATIONS TREATED AS AGENCY TRANSACTIONS

FOR FINANCIAL STATEMENT PURPOSES

3,338,187\*

INVESTMENT MANAGEMENT FEES NOT INCLUDED FOR

FINANCIAL STATEMENT PURPOSES, BUT RECOGNIZED FOR

TAX PURPOSES 51,935

JUNIOR ACHIEVEMENT USA

TOTAL 3,390,122

\* THE ORGANIZATION ASSUMES ACKNOWLEDGMENT RESPONSIBILITY FOR THESE GRANTS. THIS IS THE MOST EFFICIENT APPROACH WITH NUMEROUS LOCAL AREAS AND MEMBER NATIONS BENEFITTING FROM AN INDIVIDUAL GRANT. THEREFORE, THE ORGANIZATION INCLUDES THE GRANT REVENUE AND GRANT EXPENSE ON FORM 990.

## **SCHEDULE F** (Form 990)

# **Statement of Activities Outside the United States**

► Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16. ► Attach to Form 990. ► See separate instructions.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

▶ Information about Schedule F (Form 990) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

Name of the organization				Employer identific	ation number
JUNIOR ACHIEVEMENT USA				84-126760	4
Part I General Information Form 990, Part IV, line 1		Outside the l	Jnited States. Complete	if the organization answe	ered "Yes" on
1 For grantmakers. Does the organistance, the grantees' eligibility grants or assistance?	lity for the gran	ts or assistance	e, and the selection criteri	a used to award the	X Yes No
<ul><li>2 For grantmakers. Describe in assistance outside the United St</li><li>3 Activities per Region. (The follows)</li></ul>	tates.			-	and other
(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in region	(d) Activities conducted in region (by type) (e.g., fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for and investments in region
_(1) EUROPE			GRANTMAKING		5,200.
(2) NORTH AMERICA			GRANTMAKING		19,100.
(3) SUB-SAHARAN AFRICA			GRANTMAKING		10,800.
_(4) MIDDLE EAST AND NORTH AFRICA			GRANTMAKING		24,605.
(5) NORTH AMERICA			FUNDRAISING		
(6) EUROPE			FUNDRAISING		
(7)					
(8)					
(9)					
(10)					
<u>(11)</u>					
<u>(12)</u>					
(13)					
(14)					
<u>(</u> 15)					
(16)					
(17)					
3a Sub-total					59,705.

c Totals (add lines 3a and 3b) For Paperwork Reduction Act Notice, see the Instructions for Form 990.

59,705. Schedule F (Form 990) 2013

Schedule F (Form 990) 2013

Grants and Other Assistance to Organizations or Entities Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed. Part II

1 (a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of non-cash assistance	(h) Description of non-cash assistance	(i) Method of valuation (book, FMV, appraisal, other)
			TO SUPPORT					
(1)		EUROPE/ICELAND/GREENLAND	PROGRAMS	5,200.	WIRE TRNSFR			
į			TO SUPPORT					
(2)		NORTH AMERICA	PROGRAMS	15,500.	WIRE TRNSFR			
			TO SUPPORT					
(3)		SUB-SAHARAN AFRICA	PROGRAMS	7,200.	WIRE TRNSFR			
			TO SUPPORT					
(4)		MIDDLE EAST/NORTH AFRICA	PROGRAMS	24,605.	WIRE TRNSFR			
(5)								
(9)								
(7)								
(8)								
(6)								
(10)								
(11)								
(12)								
(13)								
(14)								
(15)								
(16)								

tions listed above that are recognized as charities by the foreign country, recognized as tax-exempt	
charities by the fo	letter
nter total number of recipient organizations listed above that are recognized as	or for which the grantee or counsel has provided a section $501(c)(3)$ equivalency letter

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Schedule F (Form 990) 2013

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84-1267604

Schedule F (Form 990) 2013

Page 3 Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 16. Part III can be duplicated if additional space is needed. Part III

(a) Type of grant or assistance

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Schedule F (Form 990) 2013

Part IV Foreign Forms Page **4** 

rarı	roleigh Forms			
1	Was the organization a U.S. transferor of property to a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)	Yes	X	No
2	Did the organization have an interest in a foreign trust during the tax year? If "Yes," the organization may be required to file Form 3520, Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A)	Yes	X	No
3	Did the organization have an ownership interest in a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect To Certain Foreign Corporations. (see Instructions for Form 5471)	Yes	X	No
4	Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see Instructions for Form 8621)	Yes	X	No
5	Did the organization have an ownership interest in a foreign partnership during the tax year? If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect To Certain Foreign Partnerships. (see Instructions for Form 8865)	Yes	X	No
6	Did the organization have any operations in or related to any boycotting countries during the tax year? If "Yes," the organization may be required to file Form 5713, International Boycott Report (see Instructions for Form 5713)	Yes	X	No

Schedule F (Form 990) 2013

Schedule F (Form 990) 2013 Page **5** 

### Part V Supplemental Information

Complete this part to provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information (see instructions).

ORGANIZATION'S PROCEDURES FOR MONITORING THE USE OF GRANT FUNDS

SCH F, PART I, QUESTION 2

GRANTS ARE TO JA OR MEMBER NATIONS ONLY. MOST OF THE FUNDING FOR THE

IS SUBMITTED TO THE ORGANIZATIONS GRANT STEWARD OR DIRECTLY TO THE DONOR.

MONIES. GRANT USAGE REQUIREMENTS VARIES BY DONOR. THE REPORTING REQUIRED

GRANTS ARE PROVIDED BY DONORS WHO PLACE RESTRICTIONS ON THE USE OF THE

Governments, and Individuals in the United States Grants and Other Assistance to Organizations,

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.

OMB No.
OMB

► Attach to Form 990.

Open to Public Inspection Employer identification number 84-1267604

Xes

▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

Department of the Treasury Internal Revenue Service JUNIOR ACHIE Part | Genera Name of the organizati

lame of	rme of the organization	Employer identifica
JUNIC	UNIOR ACHIEVEMENT USA	84-126760
Part I	Part   General Information on Grants and Assistance	
1 Do	Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and	assistance, and

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

the selection criteria used to award the grants or assistance?

1 (a) Name and address of organization or government	(p) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) JA OF NORTH CENTRAL OHIO, INC.							SUPPORT
1563 FIRESTONE PARKWAY AKRON, OH 44301	34-0940986	501(C)(3)	25,840.				MISSION
(2) JUNIOR ACHIEVEMENT OF ARIZONA, INC.							SUPPORT
636 W. SOUTHERN AVENUE TEMPE, AZ 85282	86-0184349	501(C)(3)	60,818.				MISSION
(3) JUNIOR ACHIEVEMENT OF ARKANSAS, INC.							SUPPORT
1501 N UNIVERSITY AVE LITTLE ROCK, AR 72207	71-0658775	501(C)(3)	19,825.				MISSION
(4) JUNIOR ACHIEVEMENT OF CENTRAL TEXAS, INC.							SUPPORT
P.O. BOX 684571 AUSTIN, TX 78768	74-1688335	501(C)(3)	6,188.				MISSION
(5) JUNIOR ACHIEVEMENT OF CENTRAL MARYLAND, INC.							SUPPORT
10711 RED RUN BLVD OWINGS MILLS, MD 21117	52-0688275	501(C)(3)	49,330.				MISSION
(6) JA OF GREATER BATON ROUGE & ACADIANA							SUPPORT
7809 JEFFERSON HWY, BATON ROUGE, LA 70809	72-0485727	501(C)(3)	10,135.				MISSION
(7) JA OF GREATER BIRMINGHAM, INC.							SUPPORT
216 AQUARIUS DRIVE BIRMINGHAM, AL 35209	63-0340866	501(C)(3)	25,865.				MISSION
(8) JA OF NORTHERN NEW ENGLAND, INC.							SUPPORT
400 FIFTH AVE STE 300 WALTHAM, MA 02451	04-2127020	501(C)(3)	360,892.				MISSION
(9) JA OF WESTERN NEW YORK, INC.							SUPPORT
275 OAK STREET, SUITE 222 BUFFALO, NY 14203	16-0821488	501(C)(3)	17,594.				MISSION
(10) JA OF CENTRAL CAROLINAS, INC.							SUPPORT
201 S TRYON ST CHARLOTTE, NC 28202	56-0672085	501(C)(3)	29,950.				MISSION
(11) JUNIOR ACHIEVEMENT OF CHATTANOOGA, INC.							SUPPORT
5721 MARLIN STE 3400 CHATTANOOGA, TN 37411	62-0636297	501(C)(3)	5,460.				MISSION
(12) JUNIOR ACHIEVEMENT OF CHICAGO							SUPPORT
651 W WASHINGTON BLVD CHICAGO, IL 60661	36-2170141	501(C)(3)	254,286.				MISSION
2 Enter total number of section 501(c)(3) and government org	overnment or	ganizations liste	anizations listed in the line 1 table	0		•	

For Paperwork Reduction Act Notice, see the Instructions for Form 990. 3 Enter total number of other organizations listed in the line 1 table.

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# Governments, and Individuals in the United States Grants and Other Assistance to Organizations,

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22. ▶ Attach to Form 990.

OMB No. 1545-0047	2013	Open to Public

Inspection

Employer identification number

84-1267604

Department of the Treasury Internal Revenue Service Name of the organization

▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

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JUNIOR ACHIEVEMENT USA

- Xes Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?
  - Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) JUNIOR ACHIEVENENT OF OKI PARTNERS, INC.							SUPPORT
644 LINN ST SUITE 1024 CINCINNATI, OH 45203	32-0014307	501(C)(3)	19,900.				MISSION
(2) JA OF GREATER CLEVELAND, INC.							SUPPORT
1422 EUCLID AVENUE CLEVELAND, OH 44115	34-0733164	501(C)(3)	37,058.				MISSION
(3) JUNIOR ACHIEVEMENT OF SOUTHERN COLORADO							SUPPORT
419 WEST BIJOU COLORADO SPRINGS, CO 80905	84-6009223	501(C)(3)	17,051.				MISSION
(4) JA OF CENTRAL SOUTH CAROLINA, INC.							SUPPORT
301 GREYSTONE BOULEVARD COLUMBIA, SC 29210	57-0511131	501(C)(3)	18,255.				MISSION
(5) JUNIOR ACHIEVEMENT OF DALLAS, INC.							SUPPORT
1201 EXECUTIVE DRIVE W RICHARDSON, TX 75081	75-0881589	501(C)(3)	106,261.				MISSION
(6) JUNIOR ACHIEVEMENT OF DELAWARE, INC.							SUPPORT
522 S. WALNUT STREET WILMINGTON, DE 19801	51-0078199	501(C)(3)	7,169.				MISSION
(7) JUNIOR ACHIEVEMENT - ROCKY MOUNTAIN, INC.							SUPPORT
1445 MARKET, SUITE 200 DENVER, CO 80202	84-0430495	501(C)(3)	.669,63				MISSION
(8) JUNIOR ACHIEVEMENT OF CENTRAL LOWA, INC.							SUPPORT
6100 GRAND AVENUE DES MOINES, IA 50312	42-0759070	501(C)(3)	10,000.				MISSION
(9) JA OF SOUTHEASTERN MICHIGAN, INC.							SUPPORT
577 E. LARNED, SUITE 200 DETROIT, MI 48226	38-1348535	501(C)(3)	62,807.				MISSION
(10) JA OF THE DESERT SOUTHWEST, INC.							SUPPORT
150 S. ALTO MESA, STE D EL PASO, TX 79912	74-1565161	501(C)(3)	11,115.				MISSION
(11) JA OF SOUTHWESTERN INDIANA, INC.							SUPPORT
431 E DIAMOND AVENUE EVANSVILLE, IN 47711	35-6048156	501(C)(3)	6,188.				MISSION
(12) JA OF THE CHISHOLM TRAIL, INC.							SUPPORT
6300 RIDGLEA STE 400 FORT WORTH, TX 76116	75-0944915	501(C)(3)	36,095.				MISSION
2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table	overnment or	ganizations list	ed in the line 1 table			•	

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

3 Enter total number of other organizations listed in the line 1 table.

## Grants and Other Assistance to Organizations, Governments, and Individu

Complete if the organization answered

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duals in the United States	"Yes" to Form 990, Part IV, line 21 or 22.	Form 990.

OMB No. 1545-0047	2013	11.0
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▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

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Employer identification number	84-1267604

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JUNIOR ACHIEVEMENT USA

Department of the Treasury Internal Revenue Service Name of the organization

- X Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(p) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) JUNIOR ACHIEVEMENT OF GEORGIA, INC.							SUPPORT
460 ABERNATHY ROAD NE ATLANTA, GA 30328	58-0598050	501(C)(3)	157,038.				MISSION
(2) JA OF THE MICHIGAN GREAT LAKES, INC.							SUPPORT
2650 E BELTLINE SE GRND RPDS, MI 49546	38-1557861	501(C)(3)	5,516.				MISSION
(3) JA OF CENTRAL N CAROLINA, INC.							SUPPORT
3220 NORTHLINE AVENUE GREENSBORO, NC 27408	56-0844838	501(C)(3)	25,048.				MISSION
(4) JA OF SOUTHWEST NEW ENGLAND, INC.							SUPPORT
11 ASYLUM ST SUITE 601 HARTFORD, CT 06103	06-0665972	501(C)(3)	28,385.				MISSION
(5) JA OF SOUTHEAST TEXAS, INC.							SUPPORT
2115 EAST GOVERNORS CIR HOUSTON, TX 77092	74-1153957	501(C)(3)	100,465.				MISSION
(6) JUNIOR ACHIEVEMENT OF NORTH FLORIDA, INC.							SUPPORT
4049 WOODCOCK DR JACKSONVILLE, FL 32207	59-1021800	501(C)(3)	21,826.				MISSION
(7) JUNIOR ACHIEVEMENT OF MIDDLE AMERICA, INC.							SUPPORT
4049 PENNSYLVANIA AVE KANSAS CTY, MO 64111	44-0604809	501(C)(3)	52,671.				MISSION
(8) JUNIOR ACHIEVEMENT OF EAST TENNESSEE, INC.							SUPPORT
2135 N CHARLES G SEIVERS CLINTON, TN 37716	62-0810145	501(C)(3)	14,332.				MISSION
(9) JUNIOR ACHIEVEMENT OF SOUTHERN NEVADA, INC.							SUPPORT
7220 S. CIMARRON ROAD LAS VEGAS, NV 89113	88-0354481	501(C)(3)	43,438.				MISSION
(10) JUNIOR ACHIEVEMENT OF THE BLUEGRASS, INC.							SUPPORT
1092 DUVAL ST., STE.240 LEXINGTON, KY 40515	61-0606480	501(C)(3)	6,300.				MISSION
(11) JA OF SOUTHERN CALIFORNIA, INC.							SUPPORT
6250 FOREST LAWN DR LOS ANGELES, CA 90068	95-1799192	501(C)(3)	133,773.				MISSION
(12) JUNIOR ACHIEVEMENT OF KENTUCKIANA, INC							SUPPORT
1401 W MUHAMMED ALI LOUISVILLE, KY 40203	61-0476694	501(C)(3)	28,390.				MISSION
2 Enter total number of section 501(c)(3) and government org	overnment or	ganizations liste	anizations listed in the line 1 table	0		•	

For Paperwork Reduction Act Notice, see the Instructions for Form 990. 3 Enter total number of other organizations listed in the line 1 table .

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Governments, and Individuals in the United States Grants and Other Assistance to Organizations,

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22. ▶ Attach to Form 990.

▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

Inspection

JUNIOR ACHIEVEMENT USA

Department of the Treasury Internal Revenue Service Name of the organization

Employer identification number 84-1267604

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- X Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) JA OF MEMPHIS AND THE MID-SOUTH, INC.							SUPPORT
307 MADISON AVENUE MEMPHIS, TN 38103	62-0549549	501(C)(3)	17,715.				MISSION
(2) JUNIOR ACHIEVEMENT OF GREATER MIAMI, INC.							SUPPORT
13490 NW 7 AVENUE NORTH MIAMI, FL 33168	59-0807486	501(C)(3)	79,136.				MISSION
(3) JA OF MIDDLE TENNESSEE, INC.							SUPPORT
120 POWELL PLACE NASHVILLE, TN 37204	62-0582571	501(C)(3)	7,776.				MISSION
(4) JA OF SOUTHERN MASSACHUSETTS, INC.							SUPPORT
227 UNION STREET NEW BEDFORD, MA 02740	04-3193575	501(C)(3)	6,750.				MISSION
(5) JUNIOR ACHIEVEMENT OF NEW JERSEY, INC.							SUPPORT
4365 ROUTE 1 SOUTH PRINCETON, NJ 08540	22-1774147	501(C)(3)	73,029.				MISSION
-(6) JA OF GREATER NEW ORLEANS, INC.							SUPPORT
5100 ORLEANS AVENUE NEW ORLEANS, LA 70124	72-0469314	501(C)(3)	32,000.				MISSION
(7) JUNIOR ACHIEVEMENT OF NEW YORK, INC.							SUPPORT
420 LEXINGTON AVE. NEW YORK, NY 10170	13-3031828	501 (C) (3)	265,171.				MISSION
(8) JA OF NORTHERN CALIFORNIA, INC.							SUPPORT
3003 OAK RD STE 109 WALNUT CREEK, CA 94597	94-1322179	501(C)(3)	113,455.				MISSION
(9) JUNIOR ACHIEVEMENT OF OKLAHOMA, INC.							SUPPORT
3947 SOUTH 103RD EAST AVE TULSA, OK 74146	73-0757053	501 (C) (3)	35,967.				MISSION
(10) JUNIOR ACHIEVEMENT OF CENTRAL FLORIDA, INC.							SUPPORT
2121 CAMDEN ROAD ORLANDO, FL 32803	59-0972112	501 (C) (3)	29,439.				MISSION
(11) JUNIOR ACHIEVEMENT OF CENTRAL ILLINOIS, INC.							SUPPORT
4450 N PROSPECT RD PEORIA HEIGHTS, IL 61616	37-0657600	501 (C) (3)	6,160.				MISSION
(12) JUNIOR ACHIEVEMENT OF DELAWARE VALLEY, INC.							SUPPORT
993 OLD EAGLE SCHOOL ROAD WAYNE, PA 19087	23-1386172	501(C)(3)	53,163.				MISSION
2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table	overnment or	rganizations list	ed in the line 1 table			•	

For Paperwork Reduction Act Notice, see the Instructions for Form 990. 3 Enter total number of other organizations listed in the line 1 table.

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Department of the Treasury Internal Revenue Service Name of the organization

# Governments, and Individuals in the United States Grants and Other Assistance to Organizations,

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.

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- Xes Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

<ol> <li>(a) Name and address of organization or government</li> </ol>	(p) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) JA OF WESTERN PENNSYLVANIA, INC.							SUPPORT
ONE ALLEGHENY SQUARE, PITTSBURGH, PA 15212	25-0983059	501(C)(3)	5,868.				MISSION
(2) JA OF OREGON AND SW WASHINGTON INC.							SUPPORT
7830 S.E. FOSTER ROAD PORTLAND, OR 04101	93-0384007	501(C)(3)	16,300.				MISSION
(3) JA OF ROCHESTER, NEW YORK, INC.							SUPPORT
259 MONROE AVE STE 108 ROCHESTER, NY 14607	16-0956147	501(C)(3)	5,573.				MISSION
(4) JUNIOR ACHIEVEMENT OF SACRAMENTO, INC.							SUPPORT
3800 WATT AVE STE 165 SACRAMENTO, CA 95821	94-6080866	501(C)(3)	36,272.				MISSION
(5) JUNIOR ACHIEVEMENT OF SOUTH TEXAS, INC.							SUPPORT
403 E RAMSEY STE 201 SAN ANTONIO, TX 78216	74-2061852	501(C)(3)	22,419.				MISSION
(6) JA OF SAN DIEGO & IMPERIAL CO., INC.							SUPPORT
4756 MISSION GORGE PLC SAN DIEGO, CA 92120	95-1727087	501(C)(3)	37,954.				MISSION
(7) JUNIOR ACHIEVEMENT OF WASHINGTON							SUPPORT
1700 WESTLAKE AVENUE N. SEATTLE, WA 98109	91-0604913	501(C)(3)	26,318.				MISSION
(8) JUNIOR ACHIEVEMENT OF NORTH LOUISIANA, INC.							SUPPORT
3825 GILBERT DR SHREVEPORT, LA 71104	72-0595081	501(C)(3)	8,092.				MISSION
(9) JA OF WESTERN MASSACHUSETTS, INC.							SUPPORT
1500 MAIN ST STE 217 SPRINGFIELD, MA 01115	04-2088304	501(C)(3)	11,725.				MISSION
(10) JUNIOR ACHIEVEMENT OF GREATER ST. LOUIS, IN							SUPPORT
17339 N OUTER FORTY CHESTERFIELD, MO 63005	43-0652112	501 (C) (3)	44,474.				MISSION
(11) JA OF SOUTHWEST CONNECTICUT, INC.							SUPPORT
200 CONNECTICUT AVENUE NORWALK, CT 06854	06-0932913	501(C)(3)	25,791.				MISSION
(12) JA OF TAMPA BAY, INC.							SUPPORT
13805 58TH ST N CLEARWATER, FL 33760	59-1098499	501(C)(3)	88,335.				MISSION

For Paperwork Reduction Act Notice, see the Instructions for Form 990. 3 Enter total number of other organizations listed in the line 1 table.

9:49:11 AM

# Governments, and Individuals in the United States Grants and Other Assistance to Organizations,

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.

OMB No. 1545-0047	2013

Open to Public

Inspection

▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990. ▶ Attach to Form 990.

Employer identification number 84-1267604

JUNIOR ACHIEVEMENT USA

Department of the Treasury Internal Revenue Service Name of the organization

Assistance
and
Grants
on
<b>Information</b> 6
General
Part I

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າoes the organization maintain records to substantiate the	the selection criteria used to award the grants or assistance	
Does t	the	
_		

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) JA OF THE UPPER MIDWEST, INC.							SUPPORT
1800 WHITE BEAR AVE N MAPLEWOOD, MN 55109	41-1424988	501(C)(3)	119,543.				MISSION
(2) JUNIOR ACHIEVEMENT OF UTAH, INC.							SUPPORT
515 EAST 100 S SALT LAKE CITY, UT 84102	87-0225875	501(C)(3)	46,095.				MISSION
-(3) JA OF MAHONING VALLEY, INC.							SUPPORT
44420	34-1714400	501(C)(3)	11,049.				MISSION
(4) JUNIOR ACHIEVEMENT OF GREATER WASHINGTON, I							SUPPORT
1050 17TH ST STE 750 WASHINGTON, DC 20036	54-0788947	501(C)(3)	31,294.				MISSION
(5) JA OF THE PALM BEACHES & TREASURE COAST, IN							SUPPORT
6903 VISTA PKY N WEST PALM BEACH, FL 33411	59-2333738	501(C)(3)	8,048.				MISSION
-(6) JA OF THE HUDSON VALLEY, INC.							SUPPORT
	13-3001065	501(C)(3)	23,490.				MISSION
-(7) JUNIOR ACHIEVEMENT OF WISCONSIN, INC.							SUPPORT
11111 W LIBERTY DR MILWAUKEE, WI 53224	39-0826295	501(C)(3)	41,385.				MISSION
-(8) JA WORLDWIDE							SUPPORT
OSTON, MA 02109	27-3666259	501(C)(3)	24,000.				MISSION
(6)							
(11)							
(1 <u>2</u> )							
2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table	overnment or	ganizations liste	ed in the line 1 table				68.

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

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84-1267604

Page 2

Schedule I (Form 990) (2013)

Part III

Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

	505000000000000000000000000000000000000				
(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
-					
2					
3					
4					
2					
9					
7					
Part IV Supplemental Information Complete this part to provide the information required in Part I line 2 Part III column (h) and any other additional	ois part to prov	ide the informat	ion required in	Part   line 2 Part	column (b) and any other additional

Supplemental Information. Complete this part to provide the information required in Part I, line 2, Part III, column (b), and any other additional information. Part IV

GRANT FUNDS ORGANIZATION'S PROCEDURES FOR MONITORING THE USE OF

PART I, QUESTION 2 SCH I,

MOST OF THE FUNDING FOR THE GRANTS ARE GRANTS ARE TO US JA OFFICES ONLY. PROVIDED BY DONORS WHO PLACE RESTRICTIONS ON THE USE OF THE MONIES. GRANT

THE REPORTING REQUIRED IS SUBMITTED USAGE REQUIREMENTS VARIES BY DONOR.

TO THE ORGANIZATIONS GRANT STEWARD OR DIRECTLY TO THE DONOR.

Schedule I (Form 990) (2013)

PAGE 47

**Compensation Information**For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

► Complete if the organization answered "Yes" to Form 990, Part IV, line 23.

► Attach to Form 990. ► See separate instructions. ► Information about Schedule J (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047 **Open to Public** Inspection

Department of the Treasury Internal Revenue Service Name of the organization

Employer identification number JUNIOR ACHIEVEMENT USA 84-1267604

Part	Questions Regarding Compensation			
			Yes	No
1a	Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.  First-class or charter travel  Travel for companions  Tax indemnification and gross-up payments  Discretionary spending account  Health or social club dues or initiation fees  Personal services (e.g., maid, chauffeur, chef)			
b	If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to	1b	X	
2	explain  Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked in line 1a?	2	X	
3	Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.  X Compensation committee  X Independent compensation consultant X Compensation survey or study X Form 990 of other organizations X Approval by the board or compensation committee		23	
4 a b c	During the year, did any person listed in Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:  Receive a severance payment or change-of-control payment?  Participate in, or receive payment from, a supplemental nonqualified retirement plan?  Participate in, or receive payment from, an equity-based compensation arrangement?  If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.	4a 4b 4c		XXX
5	Only section 501(c)(3) and 501(c)(4) organizations must complete lines 5-9. For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:			
a b	The organization? Any related organization?	5a 5b		X
6	If "Yes" to line 5a or 5b, describe in Part III.  For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:			
a b	The organization? Any related organization?	6a 6b		X
7	If "Yes" to line 6a or 6b, describe in Part III.  For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	7	X	
8	Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe			
9	in Part III	8		X
	Regulations section 53.4958-6(c)?	9		

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2013

84-1267604

Schedule J (Form 990) 2013

Page 2

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII. Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed

Note. The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

		amopyous (a)	M Some 1000 Misc	acito acido				
		( <b>b</b> ) breakdown	(b) Breakdown of W-2 and/or 1089-IMISC compensation	compensation	(C) Retirement and	( <b>D</b> ) Nontaxable	(E) Total of columns	(F) Compensation
(A) Name and Title		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation	other deferred compensation	benefits	(B)(í)-(D)	reported as deferred in prior Form 990
JACK E. KOSAKOWSKI	≘	321,889.	100,688.	9,698.	27,979.	22,037.	482,291.	0
1 PRESIDENT & CEO	<b>(E)</b>	O	0					
TIMOTHY ARMIJO	Ξ	150,483.	30,150.	1,728.	37,421.	18,356.	238,138.	0
2 CFO	Ξ	0	0		0	0	0	0
CECIL THIBODEAUX	≘	236,859.	52,700.	2,822.	48,374.	16,835.	357,590.	0
3 EVP	(ii)	)	0					
Ϋ́	Ξ	206,081.	36,124.	2,451.	.606,06	21,900.	357,465.	0
4 SVP - DEVELOPMENT	(ii)	)	0					
LISA GILLIS	Ξ	218,494.	30,312.	1,380.	3,305.	19,547.	273,038.	0
5 CHIEF ACADEMIC OFFICER	(ii)							
SUSAN LUU	Ξ	170,474.	37,843.	457.	5,804.	19,333.	233,911.	0
6 SVP - BUSINESS IMPROVEMENT	(ii)	)		0				
LESLIE PIERCE	≘	153,245.		2,689.	18,560.	9,949.	184,443.	0
7 SVP TALENT & ORGANIZATION DEV.	(ii)		0					
ED GROCHOLSKI	≘	202,297.	26,106.	833.	4,538.	21,867.	255,641.	0
8 SVP - BRAND	(ii)	)	0	0				
M	Ξ	147,156.	26,505.	930.	42,029.	25,263.	241,883.	0
9 SVP - OPERATIONS	Ξ	0	0	- 1				
STEVE SCHMIDT	Ξ	150,143.	29,968.	916.	14,028.	20,566.	215,621.	0
10 SVP - OPERATIONS	Ξ	O						
CHRISTINE KUNZ	Ξ	131,128.	O	1,455	10,563.	16,360.	159,506.	0
11 VP - OPERATIONS	Ξ		0					
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Schedule J (Form 990) 2013

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Schedule J (Form 990) 2013

Page 3

# Part III Supplemental Information

and for Part II. ω 4b, 4c, 5a, 5b, 6a, 6b, 7, and Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, Also complete this part for any additional information.

HEALTH OR SOCIAL CLUB DUES

SCHEDULE J, PART I, LINE 1A

ЭĒ JA USA IS PART OF FOR THE PRESIDENT & CEO FEES MONTHLY CLUB MEMBERSHIP

THESE FEES ARE INCLUDED AS THIS POSITION. PROVIDED TO THE BENEFITS

TAXABLE INCOME EACH YEAR ON THEIR W-2.

DESCRIPTION OF NON-FIXED PAYMENTS

SCHEDULE J, PART I, LINE

COMPONENTS OF THE EXECUTIVE COMPENSATION PHILOSOPHY OF TWO KEY THERE ARE

JA USA:

- 1. REWARD FOR PERFORMANCE
- REASONABLE AND COMPETITIVE PAY PACKAGES WITH THOSE OFFERED TO 2. PROVIDE

LEADERS OF ORGANIZATIONS COMPARABLE TO JA USA IN TERMS OF SIZE,

COMPLEXITY AND MISSION IMPACT.

AS PART OF THE "REWARD FOR PERFORMANCE" THE EXECUTIVE COMPENSATION

GOVERNORS HAS ADOPTED THE OF BOARD OF THE (THE COMMITTEE) SUBCOMMITTEE

MANAGEMENT INCENTIVE COMPENSATION PLAN (MIC). MIC IS INTENDED TO

ACCOMPLISH THE O<sub>L</sub> ACHIEVEMENT NECESSARY AND AND REWARD RESULTS STIMULATE

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Schedule J (Form 990) 2013

Schedule J (Form 990) 2013

Page 3

# Part III Supplemental Information

and for Part II. ω 4b, 4c, 5a, 5b, 6a, 6b, 7, and Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, Also complete this part for any additional information.

PLAN IS DESIGNED THE MIC MULTIPLE OBJECTIVES OF JA USA'S STRATEGIC PLAN.

:OI

A) MOTIVATE GROWTH IN TOTAL REVENUE AND PROGRAM IMPACT TO ENHANCE

SERVICES TO THE COMMUNITY.

B) LINK ACCOMPLISHMENT OF THE ORGANIZATION'S MISSION AND OBJECTIVES WITH

THE COMPENSATION OF THE ORGANIZATION'S MANAGERS.

PROVIDING VARIABLE COMPENSATION BASED ON PERFORMANCE BY C) CONTROL COSTS

TO ENHANCE AFFORDABILITY AND OFFERING A COMPETITIVE INCENTIVE AND TOTAL

CASH COMPENSATION PROGRAM.

D) ENHANCE THE FOCUS, MOTIVATION AND RETENTION OF KEY ORGANIZATIONAL

MANAGERS

IN SETTING THE ANNUAL INCENTIVE COMPENSATION OPPORTUNITIES FOR THE MIC

COMPARABLE OF THE THE COMMITTEE TARGETS THE MEDIAN FOR EACH EXECUTIVE, PERFORMANCE AND THE MARKET DATA FOR THAT EXECUTIVE'S POSITION FOR TARGET

UPPER QUARTILE OF THE COMPARABLE MARKET DATA FOR THAT EXECUTIVE'S

POSITION FOR SUPERIOR PERFORMANCE. THERE IS A CAP ON THE AMOUNT OF

INCENTIVE THAT ANY EXECUTIVE CAN EARN FROM THE MIC.

Schedule J (Form 990) 2013

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Schedule J (Form 990) 2013

# Part III Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

THE COMMITTEE USES DISCRETION IN DETERMINING THE LEVEL OR ACHIEVEMENT OF THE COMMITTEE ALSO ANNUALLY EXAMINES CERTAIN PERFORMANCE MEASUREMENTS.

THE COMPARABLE MARKET DATA FOR THESE POSITIONS, FOLLOWING THE THREE-STEP

GOVERNANCE PROCESS DESCRIBED IN THE REGULATIONS TO SECTION 4958 ON

INTERMEDIATE SANCTIONS TO ESTABLISH THE PRESUMPTION OF REASONABLE

COMPENSATION

THE GOVERNORS MAY, IN THEIR SOLE DISCRETION, AND AT ANY TIME, ELECT TO

AMEND, SUSPEND, OR TERMINATE THE PLAN.

Schedule J (Form 990) 2013

PAGE 52

## **Noncash Contributions**

OMB No. 1545-0047

Open To Public Inspection

Department of the Treasury Internal Revenue Service

▶ Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

▶ Information about Schedule M (Form 990) and its instructions is at www.irs.gov/form990.

Name of the organization Employer identification number JUNIOR ACHIEVEMENT USA 84-1267604

Par	Types of Property				
		(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1	Art - Works of art				
2	Art - Historical treasures				
3	Art - Fractional interests				
4	Books and publications				
5	Clothing and household				
	goods				
6	Cars and other vehicles				
7	Boats and planes				
8	Intellectual property				
9	Securities - Publicly traded	X	1.	291.	FAIR MARKET VALUE
10	Securities - Closely held stock				
11	Securities - Partnership, LLC,				
	or trust interests				
12	Securities - Miscellaneous				
13	Qualified conservation				
	contribution - Historic				
	structures				
14	Qualified conservation				
	contribution - Other				
15	Real estate - Residential				
16	Real estate - Commercial				
17	Real estate - Other				
18	Collectibles				
19	Food inventory				
20	Drugs and medical supplies				
21	Taxidermy				
22	Historical artifacts				
23	Scientific specimens				
24	Archeological artifacts				
25	Other ►( SOFTWARE)	Х	1.	460,616.	FAIR MARKET VALUE
26	Other ►()				
27	Other ►()				
28	Other ►()				
29	Number of Forms 8283 received	by the orga	inization during the tax ye	ar for contributions for	
	which the organization completed F				29 1.
	· ·				Yes No
30 a	During the year, did the organizat	ion receive	by contribution any prope	rty reported in Part I, line	s 1-28, that
	it must hold for at least three yea				
	used for exempt purposes for the e	ntire holding	period?		30a X
b	If "Yes," describe the arrangement i	n Part II.			
31	Does the organization have a	gift accept	ance policy that require	s the review of any r	ion-standard
	contributions?				31 X
32 a	Does the organization hire or use	e third parti	es or related organization	s to solicit, process, or s	sell noncash
	contributions?				32a X
b	If "Yes," describe in Part II.	· ·			
33	If the organization did not report ar	n amount in	column (c) for a type of pro	perty for which column (a	) is checked,
	describe in Part II.		-		

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) (2013) Page **2** 

Supplemental Information. Complete this part to provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

CONTRIBUTIONS

PART I, COLUMN B

THE NUMBER IN COLUMN B REPRESENTS THE NUMBER OF CONTRIBUTIONS RECEIVED.

DESCRIPTION OF OTHER NONCASH CONTRIBUTION

PART I, LINE 25

SOFTWARE UTILIZED ON JA USA SERVERS AND DESKTOP COMPUTERS AND LOCAL AREA

 ${\tt COMPUTERS.}$ 

### **SCHEDULE O**

(Form 990 or 990-EZ)

## Supplemental Information to Form 990 or 990-EZ

OMB No. 1545-0047

2013

Open to Public Inspection

Department of the Treasury Internal Revenue Service Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

Name of the organization

Employer identification number

84-1267604

ORGANIZATION'S MISSION CONT.

PART III, LINE 1

JUNIOR ACHIEVEMENT USA

JUNIOR ACHIEVEMENT IS THE WORLD'S LARGEST ORGANIZATION DEDICATED TO
GIVING YOUNG PEOPLE THE KNOWLEDGE AND SKILLS THEY NEED TO OWN THEIR
ECONOMIC SUCCESS, PLAN FOR THEIR FUTURE, AND MAKE SMART ACADEMIC AND
ECONOMIC CHOICES. OUR FINANCIAL LITERACY, WORK READINESS AND
ENTREPRENEURSHIP PROGRAMS EMPOWER STUDENTS TO MAKE A CONNECTION BETWEEN
WHAT THEY LEARN IN SCHOOL AND HOW IT CAN BE APPLIED IN THE REAL WORLD.
THIS ENHANCES THE RELEVANCE OF THEIR CLASSROOM LEARNING AND INCREASES
THEIR UNDERSTANDING OF THE VALUE OF STAYING IN SCHOOL.

### MEMBERS

PART VI, LINE 6 & 7B

THE SOLE MEMBER OF THE ORGANIZATION IS JA WORLDWIDE, INC. APPROVAL MUST BE OBTAINED FROM THE MEMBER FOR THE FOLLOWING:

- AMENDMENT, MODIFICATION, OR RESTATEMENT OF THE ARTICLES OF INCORPORATION OR BYLAWS;
- MERGER, CONSOLIDATION, REORGANIZATION, OR DISSOLUTION OF JUNIOR

  ACHIEVEMENT USA (JA USA), OR THE SALE, LEASE OR EXCHANGE, OR OTHER

  DISPOSITION, TRANSFER OR CONVEYANCE OF ALL OF SUBSTANTIALLY ALL OF ITS

  NET ASSETS;
- ANY MATERIAL CHANGE IN ANY CURRENT NONPROFIT PURPOSES AND OBJECTIVES OF JA USA;

ENTERING INTO ANY OPERATING AGREEMENT BETWEEN JA USA AND ANY OF ITS

Name of the organization

JUNIOR ACHIEVEMENT USA

Employer identification number

84-1267604

LOCAL AREAS.

DESCRIBE PROCESS TO REVIEW 990

PART VI, LINE 11B

THE FORM 990 IS PREPARED BY OUR EXTERNAL AUDIT FIRM AND IS REVIEWED BY

THE AUDIT COMMITTEE OF THE BOARD. A DRAFT IS SUPPLIED VIA A WEB SITE

LINK FOR THE ENTIRE BOARD TO REVIEW BEFORE FILING THE FINAL 990 WITH THE

IRS.

DESCRIBE HOW CONFLICT OF INTEREST POLICY IS MONITORED & ENFORCED PART VI, LINE 12C

A CONFLICT OF INTEREST QUESTIONNAIRE IS SENT VIA EMAIL OR HAND DELIVERED TO INTERESTED PARTIES EACH YEAR REQUESTING VERIFICATION OF POSSIBLE CONFLICTS. IF A CONFLICT IS DISCLOSED IN CONNECTION WITH ANY ACTUAL OR POSSIBLE CONFLICT OF INTEREST, AN INTERESTED PERSON MUST DISCLOSE THE EXISTENCE OF THE INTEREST AND BE GIVEN THE OPPORTUNITY TO DISCLOSE ALL MATERIAL FACTS TO THE DIRECTORS AND MEMBERS OF THE COMMITTEES WITH GOVERNING BOARD DELEGATED POWERS CONSIDERING THE PROPOSED TRANSACTION OR ARRANGEMENT.

AFTER DISCLOSURE OF THE INTEREST AND ALL MATERIAL FACTS, AND AFTER ANY DISCUSSION WITH THE INTERESTED PERSON, HE OR SHE SHALL LEAVE THE GOVERNING BOARD OR COMMITTEE MEETING WHILE THE DETERMINATION OF A CONFLICT OF INTEREST IS DISCUSSED AND VOTED UPON. THE REMAINING BOARD OR COMMITTEE MEMBERS SHALL DECIDE IF A CONFLICT OF INTEREST EXISTS.

Name of the organization

JUNIOR ACHIEVEMENT USA

Employer identification number

84-1267604

DESCRIBE PROCESS FOR DETERMINING COMPENSATION

PART VI, LINE 15A & 15B

THE GOVERNANCE PROCESS FOR DETERMINING COMPENSATION FOR THE

ORGANIZATION'S CEO AND OTHER TOP MANAGEMENT IS MODELED AFTER THE

REQUIREMENTS IN INTERNAL REVENUE CODE SECTION 4958 TO ESTABLISH THE

PRESUMPTION OF REASONABLE COMPENSATION. COMPENSATION WAS REVIEWED AND

APPROVED BY THE EXECUTIVE COMPENSATION SUBCOMMITTEE (THE COMMITTEE) OF

THE BOARD, WHICH IS COMPRISED OF INDEPENDENT PERSONS. BY ENGAGING AN

INDEPENDENT COMPENSATION CONSULTANT, THE COMMITTEE CONSIDERED COMPARABLE

MARKET DATA FROM PUBLISHED SURVEYS AND FORM 990 OF COMPARABLE

ORGANIZATIONS IN EVALUATING THE COMPENSATION FOR EACH INDIVIDUAL.

THE COMMITTEE CONDUCTED A REVIEW OF THIS COMPARABILITY DATA AND

DOCUMENTED ITS DELIBERATION AND DISCUSSION IN MINUTES THAT ARE RETAINED

WITH THE OTHER GOVERNANCE MATERIALS OF THE ORGANIZATION. THE COMMITTEE

FOLLOWED THE PROCESS TO ESTABLISH THE PRESUMPTION THAT COMPENSATION PAID

TO THE ORGANIZATION'S CEO AND OTHER TOP MANAGEMENT FOR PURPOSES OF

SECTION 4958 BY RELYING ON PROFESSIONAL ADVICE IN THE WRITTEN OPINION OF

REASONABLENESS FROM THE INDEPENDENT COMPENSATION CONSULTANT. THIS REVIEW

PROCESS IS CONDUCTED ANNUALLY AND WAS LAST DONE IN 2013.

DESCRIBE HOW DOCUMENTS ARE MADE AVAILABLE TO THE PUBLIC

PART VI, LINE 19

JUNIOR ACHIEVEMENT, USA MAKES ITS FINANCIAL STATEMENTS, GOVERNING

DOCUMENTS, AND CONFLICT OF INTEREST POLICY AVAILABLE TO THE PUBLIC UPON

REQUEST.

Schedule O (Form 990 or 990-EZ) 2013 Page **2** 

Name of the organization

JUNIOR ACHIEVEMENT USA

84-1267604

DOCUMENT RETENTION AND DESTRUCTION POLICY

PART VI LINE 14

JUNIOR ACHIEVEMENT USA FOLLOWS A PROCESS FOR DOCUMENT RETENTION AND DESTRUCTION BASED UPON THE AICPA RECOMMENDED RETENTION PERIOD. THE PROCESS IS NOT A WRITTEN POLICY ADOPTED BY THE BOARD THEREFORE THE QUESTION MUST BE ANSWERED NO.

### COMPENSATION

PART VII

COMPENSATION DELIBERATIONS TAKE INTO ACCOUNT SERVICES PROVIDED TO THE FILING ORGANIZATION AND ITS AFFILIATES. REVENUE PRESENTED IN THE FORM 990 DOES NOT INCLUDE THE REVENUE OF THE 116 JA AREA AFFILIATES WHO ARE PART OF THE JA USA NETWORK THAT JA USA OVERSEES. IN FYE 2014, REVENUE OF ALL AFFILIATES TOTALED \$187 MILLION.

OTHER CHANGES IN NET ASSETS

PART XI, LINE 9

NET ASSET TRANSFER TO AFFILIATE

(860,587)

ATTACHMENT 1

### 990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

NAME AND ADDRESS	DESCRIPTION OF SERVICES	COMPENSATION
MOORE WALLACE INC/RR DONNELY PO BOX 730216	STORAGE/ASSEMBLY	1,353,434.
DALLAS, TX 75373		
SPARK AGENCY, INC. PO BOX 790379	TRANSPORT/STORAGE	637,486.
ST. LOUIS, MO 63179		
SNI COMPANIES	TEMP STAFFING	529,324.

Schedule O (Form 990 or 990-EZ) 2013 Page 2

Name of the organization	Employer identification number
JUNIOR ACHIEVEMENT USA	84-1267604
	ATTACHMENT 1 (CONT'D)

990, PART VII- COMPENSATION OF THE FIVE HIGHES	ST PAID IND. CONTRACTORS	
NAME AND ADDRESS	DESCRIPTION OF SERVICES	COMPENSATION
PO BOX 814238 HOLLYWOOD, FL 33081		
NOGGIN LABS 4619 N RAVENSWOOD STE 303 CHICAGO, IL 60640	HOSTING/DEVELOPMENT	372,350.
PORTER NOVELLI 1838 SOULTIONS CENTER	MARKETING	287,714.

FORM 990, PART VIII - GROSS SALES AND COST OF GOODS SOLD	ATTACHMENT 2
GROSS SALES LESS RETURNS AND ALLOWANCES	14,259,030.
INVENTORY AT BEGINNING OF YEAR	3,326,072.
PURCHASES	4,789,651.
SALARIES AND WAGES	
OTHER COSTS	
SUBTOTAL	8,115,723.
MINUS ENDING INVENTORY	2,807,279.
COST OF GOODS SOLD	5,308,444.

ATTACHMENT	3

## FORM 990, PART X - INVESTMENTS - PUBLICLY TRADED SECURITIES

	BEGINNING	ENDING	COST
DESCRIPTION	BOOK VALUE	BOOK VALUE	OR FMV
EQUITY SECURITIES	3,652,810.	3,329,273.	FMV

CHICAGO, IL 60677

Schedule O (Form 990 or 990-EZ) 2013

Name of the organization

JUNIOR ACHIEVEMENT USA

84-1267604

ATTACHMENT 3 (CONT'D)

FORM 990, PART X - INVESTMENTS - PUBLICLY TRADED SECURITIES

BEGINNING ENDING COST

DESCRIPTION BOOK VALUE BOOK VALUE OR FMV

FIXED INCOME MUTUAL FUNDS AND

MUNICIPAL SECURITIES 5,856,218. 3,966,279. FMV

TOTALS 9,509,028. 7,295,552.

ATTACHMENT 4

FORM 990, PART X - SECURED MORTGAGES AND NOTES PAYABLE

LENDER: IKON COPIER

ORIGINAL AMOUNT: 55,040.

INTEREST RATE: 1.860000

DATE OF NOTE: 04/08/2009

MATURITY DATE: 03/21/2014

REPAYMENT TERMS: MONTHLY LEASE PMTS OF \$960.50

SECURITY PROVIDED: EQUIPMENT PURPOSE OF LOAN: CAPITAL LEASE

ENDING BALANCE DUE .....

LENDER: IKON COPIER

ORIGINAL AMOUNT: 526,707.

INTEREST RATE: 2.710000

DATE OF NOTE: 06/30/2009

MATURITY DATE: 09/01/2014

REPAYMENT TERMS: MONTHLY LEASE PMTS OF \$9,439.70

SECURITY PROVIDED: EQUIPMENT
PURPOSE OF LOAN: CAPITAL LEASE

ENDING BALANCE DUE .....

Schedule O (Form 990 or 990-EZ) 2013 Page **2** 

Name of the organization

JUNIOR ACHIEVEMENT USA

84-1267604

LENDER: IKON COPIER

ORIGINAL AMOUNT: 58,140.

INTEREST RATE: 2.710000

DATE OF NOTE: 06/30/2009

MATURITY DATE: 09/01/2014

REPAYMENT TERMS: MONTHLY LEASE PMTS OF \$1,042.00

SECURITY PROVIDED: EQUIPMENT
PURPOSE OF LOAN: CAPITAL LEASE

LENDER: HASSLER POSTAGE MACHINE
ORIGINAL AMOUNT: 18,298.
INTEREST RATE: 1.650000
DATE OF NOTE: 01/03/2014
MATURITY DATE: 10/01/2018

REPAYMENT TERMS: MONTHLY LEASE PMTS OF \$321.99

SECURITY PROVIDED: EQUIPMENT
PURPOSE OF LOAN: CAPITAL LEASE

BEGINNING BALANCE DUE .....

ATTACHMENT 4 (CONT'D)

Schedule O (Form 990 or 990-EZ) 2013 Page **2** 

Name of the organization Employer identification number JUNIOR ACHIEVEMENT USA 84-1267604 ATTACHMENT 4 (CONT'D) RICOH COPIER LENDER: ORIGINAL AMOUNT: 294,308. INTEREST RATE: 1.290000 05/01/2014 DATE OF NOTE: 05/01/2018 MATURITY DATE: REPAYMENT TERMS: MONTHLY LEASE PMTS OF \$6,294.27 SECURITY PROVIDED: EQUIPMENT PURPOSE OF LOAN: CAPITAL LEASE BEGINNING BALANCE DUE ..... ENDING BALANCE DUE ..... 289,536. 162,999. TOTAL BEGINNING MORTGAGES AND OTHER NOTES PAYABLE

306,281.

TOTAL ENDING MORTGAGES AND OTHER NOTES PAYABLE

Name of the organization Department of the Treasury

Internal Revenue Service

JUNIOR ACHIEVEMENT USA

Related Organizations and Unrelated Partnerships

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37. ▶ Attach to Form 990.

▼ See separate instructions.

▶ Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

Inspection

Employer identification number

84-1267604

Partl	Identification of Disregarded Entities Complete if the organization answered "Yes" on Form 990, Part IV, line 33.	organization answe	ered "Yes" on Fo	orm 990, Part IV	, line 33.		
	(a) Name, address, and EIN (if applicable) of disregarded entity	о.	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(9)							
Part	Identification of Related Tax-Exempt Organizations One or more related tax-exempt organizations during the	Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had the tax year.	anization answe	red "Yes" on Fc	ırm 990, Part IV,	line 34 because	it had
	(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	Section 512(b)(13) controlled entity?
(1) SEE P	PART VII					N/A	
<u>(9)</u>							
For Paper	For Paperwork Reduction Act Notice, see the Instructions for Form 990.					Schedule	Schedule R (Form 990) 2013

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Page 2

Schedule R (Form 990) 2013

(i) Section 512(b)(13) controlled entity? Yes Percentage ownership (h) Percen-tage (j) General or managing partner? Ŷ Identification of Related Organizations Taxable as a Corporation or Trust Complete if the organization answered "Yes" on Form 990, Part IV, Identification of Related Organizations Taxable as a Partnership Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year. Yes (g) Share of end-of-year assets (i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) (f) Share of total income (h) Disproportionate Ŷ allocations? Type of entity (Coop, Scop, or trust) (g) Share of end-ofyear assets line 34 because it had one or more related organizations treated as a corporation or trust during the tax year (f) Share of total (d)
Direct controlling
entity income (e)
Predominant
income (related,
unrelated,
excluded from
tax under
sections 512-514) (c) Legal domicile (state or foreign (b) Primary activity Direct controlling 1 (c) Legal domicile (state or foreign country) (a) Name, address, and EIN of related organization Primary activity <u>@</u> (a) Name, address, and EIN of related organization Part III Part IV <u>ල</u> 4 2  $\Xi$ <u>ල</u> 4 3  $\Xi$ <u>8</u> 9 2 9 

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Schedule R (Form 990) 2013

# Transactions With Related Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36. Part V

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.			l	Yes	ž
During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?	ore related organizations list	ted in Parts II-IV?			
Receipt of (i) interest (ii) annuities (iii) royalties or (iv) rent from a controlled entity				m	×
Gift, grant, or capital contribution to related organization(s)			1 1	× 9	
Gift, grant, or capital contribution from related organization(s)			10	×	
Loans or loan guarantees to or for related organization(s)			10	×	
			- 1 - 0	ω	×
				,	:
Dividends from related organization(s).			:	_	$\prec$
Sale of assets to related organization(s)			.: 19	×	
Purchase of assets from related organization(s)			1h	Ч	$\times$
Exchange of assets with related organization(s)			=	_	×
Lease of facilities, equipment, or other assets to related organization(s)			-	<u> </u>	×
Lease of facilities, equipment, or other assets from related organization(s)					$\times$
Performance of services or membership or fundraising solicitations for related organization(s)			=	×	
Performance of services or membership or fundraising solicitations by related organization(s)			1m	٦	×
Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)			- 1n	_	×
Sharing of paid employees with related organization(s)			10	0	×
Reimbursement paid to related organization(s) for expenses			1p	۵	$\times$
Reimbursement paid by related organization(s) for expenses			.: 19	5	$\times$
			•		>
Orner transier of cash of property to related organization(s)			<u>= </u> ,	_	۲ ۲
Other transfer of cash or property from related organization(s).			18	s	×
If the answer to any of the above is trest, see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.	lete triis line, including cove	red relationsnips and transa	ction threshol	ds.	
(a) Name of related organization	(b) Transaction type (a-s)	( <b>c)</b> Amount involved	(d) Method of determining amount involved	etermini nvolved	<u>i</u> ug
JSA 3E1309 1.000			Schedule R (Form 990) 2013	066 m.c	) 2013

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84-1267604

# Unrelated Organizations Taxable as a Partnership Complete if the organization answered "Yes" on Form 990, Part IV, line 37 Part VI

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(4) Name, address, and EIN of entity Primary activity (state of principal country) (state of principal	Primary activity	Country)	(d) Predominant income (related, unrelated, excluded from tax under section 512514)	Are all partners section 501(c)(3) Organizations?  Yes No	Share of total income	Share of end-of-year assets	Dispropertionate allocations?  Yes No	Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	General or managing partner?  Yes No		(k) Percentage ownership
(11)       (12)       (13)       (14)       (15)											
(16) USA 3E1310 1.000								Sch	edule R	Schedule R (Form 990) 2013	30) 2013

Schedule R (Form 990) 2013 Page **5** 

### Part VII Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule R (see instructions).

RELATED ORGANIZATIONS

SCHEDULE R, PART II

JUNIOR ACHIEVEMENT USA AND ITS US AFFILIATES, MANY OF WHOM ARE INDICATED ON SCHEDULE I, ARE COVERED UNDER A GROUP EXEPMTION AND ARE RELATED FOR SCHEDULE R PURPOSES.

RELATED ENTITIES COVERED BY A GROUP EXEMPTION ARE NOT REQUIRED TO BE
LISTED ON SCHEDULE R, PART II, HOWEVER, TRANSACTIONS BETWEEN JA USA AND
THE RELATED ORGANIZATIONS ARE INDICATED ON SCHEDULE R, PART V, LINE 1.