

**RUTH LILLY
MINOR GIFT REQUEST
(UP TO \$50,000)
FOR 2005**

DUE BY OCTOBER 31, 2004

DATE: October 27, 2004

AMOUNT REQUESTED: \$50,000

NAME OF ORGANIZATION: Junior Achievement Pioneers
(Retired Executives Association of JA Worldwide)

CONTACT PERSON: Thomas G. Dewar

COMPLETE ADDRESS: One Education Way
Colorado Springs, Colorado 80906

TELEPHONE/FAX NUMBER: 719-540-6257 / 719-540-6119

E-MAIL ADDRESS: tdewar@ja.org

TAX ID NUMBER: 84-1267604

YEARS IN EXISTENCE: 85 (since 1919)

SIGNATURE OF REQUESTOR: _____

TITLE OF REQUESTOR: Senior Vice President - Development

1. WHAT IS THE CURRENT PURPOSE OF THE PROPOSED GIFT REQUEST?

To help complete the creation of the JA Living History Archival Initiative which includes (1) creation of the Junior Achievement Pioneers' Museum of Junior Achievement History, located at JA Worldwide Headquarters, Colorado Springs, Colorado; (2) ongoing development of the JA Archives which are housed in the Ruth Lilly Library at Indiana University/Purdue University Indianapolis; and (3) to continually update the written history of Junior Achievement.

2. WHO WILL BENEFIT AND HOW MANY PEOPLE WILL BE SERVED?

JA currently impacts 6.5 million students **annually** and has served 51 million students since 1919, who are now our alumni. JA employs approximately 2,000 staff members and enjoys the ongoing involvement of over 1,500 retired employees, who comprise the Junior Achievement Pioneers. The Museum will be visited by worldwide staff who come for training and education updates, as well as visitors from around the world, while the web-published history and permanent archives are available to all who seek information, past and present, about JA.

3. WHY IS YOUR ORGANIZATION AN APPROPRIATE GROUP TO MEET SUCH NEEDS?

Junior Achievement's mission is to provide all students with the tools and inspiration to make their future the best that they can be. We work with children from 5-18 years of age, helping them set goals as they strive to learn-by-doing and appreciate the Free Enterprise System. Showcasing the history of JA allows today's students to learn from and about the hard work and entrepreneurial spirit of our world's great business leaders and emulate them in the future.

4. HOW WILL THIS PROJECT BE SUSTAINED (OR MAINTAINED) WHEN THIS REQUESTED FUNDING CEASES?

The overall budget will allow the completion of all three phases of the project, as well as ongoing maintenance, periodic updates to the displays and annual updates of the written history. The museum displays will be fully rotated every six months to showcase the amazing quantity of materials already archived, as well as additional items being secured and catalogued daily. Once we have achieved the campaign's goal, initial funding needs will be satisfied.

5. WHAT OTHER FUNDERS ARE INVOLVED IN SUPPORT OF THIS EFFORT?

The most amazing aspect of this project is that the majority of funding secured has been provided by the current and retired employees of Junior Achievement. Through an effort called "The Heritage Campaign", to-date more than 300 employee gifts have already been made that total \$203,000. Additional investments have been received from Lilly Endowment Inc., El Pomar Foundation, The Colorado Visitors and Convention Bureau and several others. The final phases of the campaign will focus on JA Worldwide board members and additional corporations and foundations.

6. WHAT PERCENT OF THE PROJECT BUDGET IS THIS REQUEST?

This request represents 6.7% of the total budget.

Please note that the Annual Report, 501(c)(3) letter, Financial Statement and Board Listing are for JA Worldwide, the parent organization for the Junior Achievement Pioneers. The Budget is for this project.

PLEASE ATTACH THE FOLLOWING ITEMS TO GIFT REQUEST:

- ANNUAL REPORT OR SUMMARY OF PURPOSE – *exhibit #1*
- MOST RECENT FINANCIAL STATEMENT – *exhibit #2*
- PROPOSED BUDGET FOR GRANT PROJECT – *exhibit #3*
- LIST OF BOARD OF DIRECTORS – *exhibit #4*
- CURRENT 501(c) (3) LETTER OF DETERMINATION – *exhibit #5*
- COPY OF FULL JUNIOR ACHIEVEMENT PROPOSAL – *exhibit #6*

MAIL THE ORIGINAL AND **FOUR (4) COPIES** OF THE COMPLETED REQUEST FORM AND **FOUR (4) COPIES** OF THE ATTACHMENTS TO:

RUTH LILLY
C/O PEGGY PFAU
NATIONAL CITY BANK OF INDIANA
101 WEST WASHINGTON STREET, SUITE 600E
INDIANAPOLIS, IN 46255

QUESTIONS: CONTACT PEGGY PFAU

By mail @ the above address

By telephone @ (317) 267-7292

By facsimile @ (317) 267-3959

By e-mail @ peggy.pfaus@nationalcity.com

ADDITIONAL INFORMATION:

Please limit your responses to the spaces provided. If you feel a response needs further explanation, please summarize on form and attach additional pages. Also, please do not use binders, folders or other extraneous materials.

Decisions regarding the request will be determined and conveyed approximately April 20, 2005.

are displayed for the enjoyment of all who visit the museum display. Additionally, such items as membership pins and certificates, and pictures from our growing library uncovered through the archival process, are labeled and displayed showing students, educator, business and community program volunteers, staff and board members engaged in the Junior Achievement process. The Museum will also celebrate twenty-two years of our National Junior Achievers Conference (NAJAC) that was held on the campus of Indiana University in Bloomington, Indiana.

Working with architects, interior designers, contractors specializing in commercial construction, electrical specialists and others, we created a detailed plan to convert this beautiful space, with huge windowed walls overlooking the Cheyenne Mountains and Pikes' Peak, into an exciting place for our associates and guests from around the globe to spend many hours learning and reflecting on the result and impact of our Free Enterprise System.

MOVING FORWARD

The JA Living History Archival Initiative Committee is now ready to enter the second and final phase of its project to identify, securely store and display the many items that will keep the organization's history alive and available to all.

A total budget of \$750,000 has been developed to cover the expenses of completing this project. Included in this budget are:

- Continued identification of archival materials from JA operations world-wide, with regular submissions to the Junior Achievement Archives at the Ruth Lilly Library in Indianapolis
- Completion of the Living History interviews that will then allow the creations of the book detailing the organization's progress over the past 85 years. Annual updates will also need to be funded in order to insure that the history book will never become out-dated
- Construction of the Archives Museum at the Junior Achievement Worldwide Headquarters in Colorado Springs, Colorado

(Complete budget attached.)

In order to achieve this funding goal, several actions have already been taken:

A campaign has been initiated that will allow current and retired Junior Achievement professional staff members to provide financial support for the overall archives project.

Letters of request have been sent to the nearly 2,000 people who have given a substantial portion of their working life to the Junior Achievement family. Through this campaign, we hope to raise \$225,000 toward the overall archives project. We are pleased to announce that we have already secured over \$203,000 from this effort!

A campaign for “gift-in-kind” donations has been initiated.

Requests are being submitted to firms who produce and distribute items required in the construction of the Museum for donation of the needed items as tax deductible “gifts in kind”. For instance, we are currently working with a firm for the donation of a series of flagpoles that will allow us to have an ever-changing display of flags of our 98 member nations.

Extensive research is being completed to identify high-potential donors. A significant gift for the Museum portion of the project has been secured.

We are identifying foundations, corporations and individuals who understand and appreciate the need to create and maintain Living Archives for organization's whose reach has enhanced the lives of young people around the globe. Proposals will be written and submitted for gifts ranging from \$10,000 to \$50,000.

Mr. Jim Hemak, a past employee of Junior Achievement and now a prominent business owner, has already committed \$100,000 towards the creation of the physical museum.

OUR REQUEST

Mrs. Lilly, on behalf of the Junior Achievement Worldwide organization, I would like to respectfully ask you to consider an investment of \$50,000 towards completing the creation of the JA Living History Archives Initiative.

This pledge of support will be utilized to spur other interested foundations, corporations and individuals to join with you in supporting the creation and ongoing management of the Museum of Junior Achievement History, the official archives at the Ruth Lilly Library in Indianapolis, and the completion of the written history of the organization. An author from Zionsville, Indiana, has been chosen to complete this project.

CONCLUSION AND ONE MORE SPECIAL REQUEST

On behalf of the entire committee, I would like to express my appreciation for the time you have taken to read our request and appreciate the importance of this unique project. I feel that you understand the need for an organization to maintain its life-long history through the establishment of an official archive. The second and final phase of the project will allow the archives to be completed, the history to be fully written, and the formal museum-quality display to be fully funded and maintained. Your gift will be the impetus to others to help us complete this important project.

Mrs. Lilly, if you would find it useful, I would be pleased to visit you in person to discuss this proposal in more detail and to answer any questions you might have. This meeting would be scheduled at your convenience – I will make myself available whenever your calendar will allow. I would also like to ask Mrs. Pam Hicks to accompany me. She is a dear friend to the Junior Achievement organization, whose late husband, David Hicks, is himself an integral part of our history. He served as JA's President in Central Indiana for 36 years! He was chairman of the JA Pioneers at the time of his passing in 1999, and was spearheading the Archival project.

Again, thank you for considering our request for funding that will drive the completion of the Living History Archival Initiative.

CONTACTS

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