

CENTER FOR THE
FUTURE OF ARIZONA

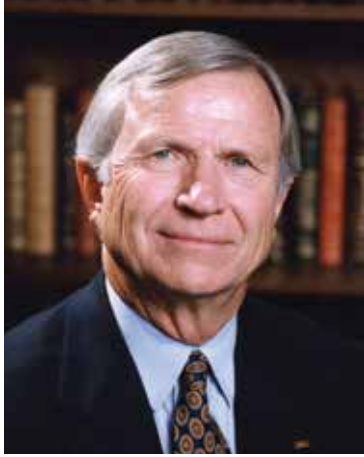


The Arizona We Want · The Education We Need

VISION 2025:

**Arizona
comes
of age**





Lattie F. Coor, PhD
*Chairman and CEO
Center for the Future
of Arizona*

VISION 2025: Arizona Comes of Age

The title of this report was chosen to reflect, in a meaningful way, what we've learned about who we are as Arizonans, the goals we share and the length of time we believe it will take to achieve them.

We chose the **coming of age** theme because our work has taught us just how enlightened and bold our forbearers were in shepherding this very young state through its early growing pains. They built the foundation that made it possible for Arizona to grow so rapidly and to accomplish so much. And, with it, they provided an example of citizens and leaders working together for the long-term benefit of the state.

In very short order, we established a statewide public education system and built a high-quality system of public universities and community colleges, one of the largest and most accessible in the nation.

Arizona leaders put an infrastructure in place that includes arguably the best water management plan in the western United States. We built a national model of accessible health-care for all Arizonans. We preserved and managed one of the largest networks of natural open spaces and recreation areas in the country, attracting both new residents and millions of international visitors every year. Most important, we set an example of practical problem solving that transcends party politics.

But all achievements are transitory. And the challenges of the present don't go away simply because leaders and citizens made good decisions in the past.

The major issues that confront us today remain the same issues that confronted us in the past. Education, job creation, infrastructure, healthcare, water and land management are the building blocks of prosperity and quality of life. The availability of young talent and high levels of citizen participation are core to our success.

Every generation is confronted with the need to successfully address these same issues in ways that provide people with more opportunities to live a secure and rewarding life.

THE ROLE OF THE CENTER

When the Center for the Future of Arizona (CFA) was established in 2002, it was a time of dynamic change in Arizona. While the economy was still growing, there was an underlying uneasiness as to where Arizona was headed with repeated calls for strong leadership that could create a vision for the state's future.

The central question before us then and now remains the same. How can Arizona accelerate the rate at which it continues to bring economic prosperity, quality of life and opportunity to the people who live here?

CFA was established as a nonpartisan, nonprofit resource to explore the questions that confront us, focus on big ideas, provide impartial analyses and collaborative leadership that is willing and able to identify long-term solutions to the most challenging issues of our time.

Our intent was never to focus on immediate concerns or to simply identify major issues for discussion. From the beginning our commitment as a self-defined "do tank" is to take promising ideas and put them into action.

Our mission is to focus on the long-term future of the state. The way we approach our work is straightforward and consistent.

CFA continually seeks to:

- **Understand “who we are” as Arizonans by identifying and assessing the goals of the people who live here.**
- **Identify those high-impact issues where new ideas, designs and systems are gaining momentum and need to be made part of the public discussion and explored more deeply.**
- **Provide opportunities for public discussion and planning focused on long-term issues.**
- **Advance proven ideas, directly or with partners, in ways that mobilize Arizonans around a common vision.**

Our efforts are focused on achieving the results that only come with long-term planning, successful execution by Arizona leaders and, most importantly, the active and continuing involvement of the people of Arizona.

In both practice and theory, citizen goals are at the heart of all we do. We believe this commitment fits well with the more modern, western form of the Arizona Constitution that vests greater responsibility than earlier eastern models in citizens as active participants in the policy process.

From the beginning, our efforts have relied on factual statistics from reliable sources that include both quantitative and qualitative measures. This report is no exception. We hope you will find the information valuable in your own planning and activities.

We also hope you will agree that we need leaders and citizens who are engaged and willing to work together to fully realize Arizona’s future.

As a young and ambitious state working at the forefront of the nation’s challenges, the progress we make over the next 10 years will benefit Arizona and the nation.

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National Partners
Friends
Advisory Board
Board of Directors

In both practice and theory, citizen goals are at the heart of all we do.

VISION 2025 is both a celebration and a call to action. In preparing the report, the Center asked nearly 100 critical readers to speak to the quality of leadership that characterizes Arizona and to suggest some outstanding leaders they consider exemplary. The few we are able to include are merely representative of a great Arizona strength—leadership and the ability to get things done.

Arizona leaders considered exemplary by critical readers include:



Sandra Day O'Connor



Cesar Chavez



Frank Snell

LEADERSHIP

We need to bring the same quality of leadership, courage and execution to this time in our history as our forbearers did in the past.

A Call to Action

The purpose of this report is to set forth a *call to action* that challenges both citizens and leaders to focus on the long-term future of Arizona.

The goal is to transform *who we are* today as a state and what we can predict about our future into an action plan that can achieve the goals of the people who live here. To be successful, we need to bring the same quality of leadership, courage and execution to this time in our history as our forbearers did in the past.

CFA Commitment: HELP ARIZONANS UNDERSTAND WHO WE ARE TODAY

FACTS

- 1. Consistently, since statehood, almost two-thirds of Arizonans were born elsewhere.**
National polling data shows that we may look like the rest of the nation in terms of our aspirations and political views, but we don't behave like the rest of the nation in our citizen participation.
- 2. Arizonans are growing younger, older and more diverse.**
Latinos will become the majority population in Arizona by 2028. We are also becoming younger and older than national averages.
- 3. Arizona's productivity and prosperity are declining compared to U.S. averages and those of many neighboring states.**
Despite the size of our economy (GDP), the state's productivity is declining in ways that impact our economic competitiveness.
- 4. One in five Arizonans live in poverty and the per capita income of Arizonans has declined.**
Over the past two decades, our per capita income has slipped to just over 80% of the national average.
- 5. Arizona citizens are not as fully engaged as we must be if our goals are to be realized.**
Our civic participation rates are in the bottom quartile on most indicators tracked by the Civic Health Index; our confidence in government and other institutions is weakening.

Arizona leaders considered exemplary by critical readers include:



Bruce Babbitt



Betty & Jean Fairfax



Raul Castro

LEADERSHIP

CFA Commitment: IDENTIFY AND ADDRESS HIGH-IMPACT ISSUES THAT ARE GAINING MOMENTUM AND NEED ATTENTION

PROJECTIONS

- 6. 68% of Arizona jobs will require post-secondary education and training by 2020.**
The impact on wages and workforce development will be profound.
- 7. Unless Arizonans focus on results for all students with a comprehensive long-term funding plan, the debate over education will continue with little or no progress made.**
One of the highest priorities among Arizonans is for children to graduate from high school prepared for success in college, career and life as measured by national and international standards. They also want job training opportunities for Arizonans of all ages.
- 8. Water and other resource management issues will grow in urgency throughout Arizona and the west.**
Arizonans need a better understanding of water management—the interdependent relationships we have with the federal government, tribal governments, neighboring states and international corporations. The same is true for other environmental issues.
- 9. The state of our infrastructure is somewhat positive but at risk due to declining investments.**
Arizona faces a daunting challenge—how to prioritize \$89 billion of projected transportation needs with \$26 billion of expected revenue.
- 10. Primary election results in Arizona will continue to determine general election results in most cases.**
The growing disconnect between citizens and government at state and federal levels will gain increasing attention.

CFA Commitment: PROVIDE OPPORTUNITIES FOR PUBLIC DISCUSSION AND PLANNING FOCUSED ON LONG-TERM ISSUES

UNCERTAINTIES

- 11. What are the constraints to visionary leadership today and what needs to change?**
The state's budgeting process and 2 to 4 -year election cycles keep our attention focused on short-term concerns.
- 12. What is the biggest challenge Arizonans must confront to ensure our economic competitiveness?**
The most important factors are the quality and availability of our workforce, a modern physical infrastructure, sound water management and the overall cost of doing business here.
- 13. Will Arizona leaders commit to a long-term investment strategy?**
Future decisions about revenues, expenditures and long-term investments must be evaluated by the results of the decisions we make.
- 14. How can Arizona provide a predictable legal path for everyone who lives and works here?**
Although this is primarily a federal issue, Arizonans must continuously work to help shape a sensible and enduring solution.
- 15. Will Arizonans become more actively involved in helping shape the state's future?**
Significantly increased citizen participation in urging leaders at all levels to adopt our citizen goals will be essential to ensuring that we realize the Arizona we want.

53.8%

of Arizonans do not consider the amount of state taxes they pay as too high.

Source: Gallup Analytics, 2013
State of the States



Virginia Piper



Barry Goldwater



Jack Pfister

LEADERSHIP

The mission of the Center is to help Arizona shape its future through an action-oriented agenda that focuses on issues critical to the state.

VISION 2025: What will Success Look Like?

Based on the facts, projections and uncertainties that confront us, Arizona's *coming of age* means becoming a place where people feel connected, optimistic and excited about being part of the state's future.

Vision: Arizona citizens and leaders will actively pursue a common ROADMAP for the future.

The growing disconnect between citizens and the institutions that serve us must be bridged in ways that build public confidence and the public will to achieve citizen goals.

CFA Commitment:

- Increase the responsiveness of government and other leaders to citizen goals.
- Develop community-based exchanges that empower individual efforts and create a collective voice for all citizen goals.
- Develop, engage and encourage young talent to stay and be participants in Arizona.

Vision: Arizona's education system ensures EXCELLENCE and EQUITY for every student.

The success of every child is vital to our state's economic prosperity, quality of life and civic health. To deliver on the promise of education, our education system must close the achievement gap and provide both excellence and equity.

CFA Commitment:

- Incubate innovative education solutions to the challenges that confront us in our education system.
- Empower student success through personalized college and career pathways.
- Equip school leaders to help all students succeed.

Vision: Arizona is known for successful multi-sector COLLABORATIONS that move Arizona goals forward.

The long-term challenges that confront Arizona today cannot be resolved with unilateral action by any one sector. Moving Arizona forward will require leaders and citizens to work together and achieve a common purpose.

CFA Commitment:

- Support collaborative leaders and inspire public policy based on the demographics that define Arizona.
- Work closely with partners to achieve the same quality of thought leadership and execution that has served Arizona in the past.
- Position Arizona as a national leader in addressing key issues that challenge modern economies and democracies.

Mission of the Center for the Future of Arizona

The mission of the Center is to help Arizona shape its future through an action-oriented agenda that focuses on issues critical to the state. More than a think tank, the Center is an independent "do tank" that combines research with collaborative partnerships and initiatives that serve the public interest and the common good.

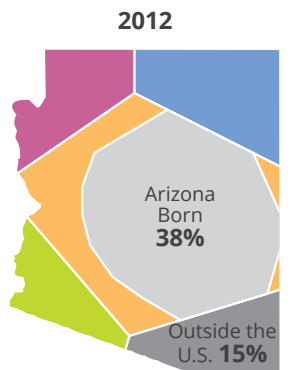
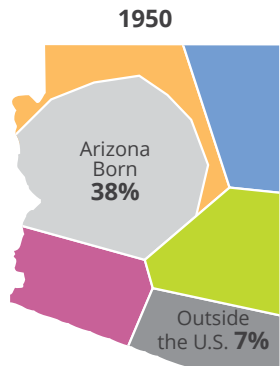
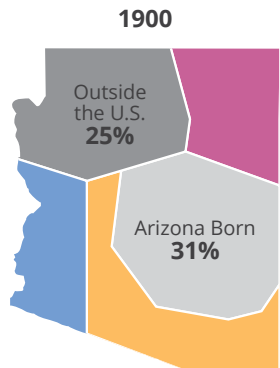


LA PLACITA PARK
TUCSON, ARIZONA



The Arizona We Have

**112 YEARS -
SAME PATTERN**



■ Arizona Born ■ Northeast
■ South ■ Midwest ■ West
■ Outside the U.S.

Source: U.S. Census, University of Minnesota Population Center, N.Y. Times, August 2013-2014.

FACTS: Demographics and Diversity

When newcomers arrive in Arizona, they often find us hard to understand. The Arizona they see portrayed in the media is not the place they find and come to know. What attracts people to Arizona? It's usually a new job, the chance to own a home or go to college, a great climate, lower cost of living or a more comfortable retirement. This opportunity for a better life drove Arizona's prosperity throughout the 20th century.

Arizona's story begins with a surprising fact.

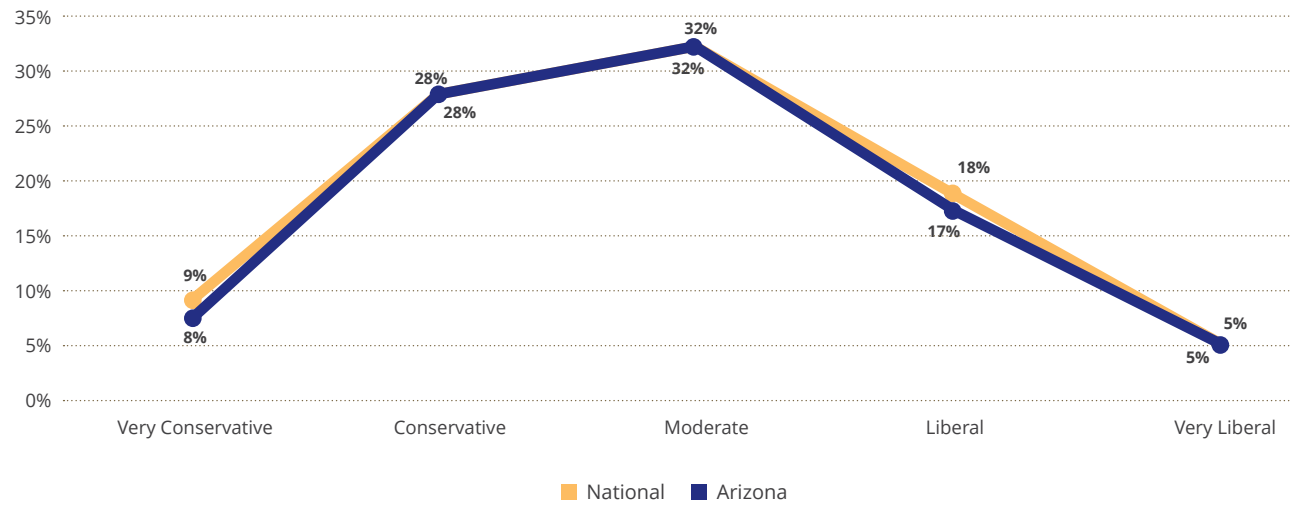
1. Consistently, since statehood, almost two-thirds of Arizonans were born elsewhere.

Arizona has the third-lowest percentage of in-state born citizens in the nation. Only Nevada (25%) and Florida (36%) are lower. Nearly 190,000 Californians moved to Arizona between 1995 and 2000 with more than 92,000 Arizonans moving to California. The net migration of 94,000 newcomers represented nearly one-third of total net migration for this time period. Other states with high net migration include Illinois, Michigan, Minnesota, New York and Washington.

Considering the diverse political views of these states, it should come as no surprise that Arizonans describe their political views almost exactly like the nation as a whole.

WE LOOK A LOT LIKE THE NATION WE COME FROM

Describe your Political Views



Gallup Analytics, U.S. Daily Tracking, 2013-2014

2. Arizonans are growing younger, older and more diverse.

Our state has been one of the fastest growing in the nation for decades. But the overall numbers aren't as important to our future as the demographics that describe who we are today.

The Arizona Tax Research Association points out in a new report on K-12 Finance Statistics (June 2015) that "Arizona is demographically challenged from a public policy standpoint on any per capita exercise." We have a large population of dependent children and older Arizonans. Baby Boomers, who range in age from 50 to 69, will increase our 70+ population significantly over the next 10 to 15 years. Many are likely to work longer than earlier generations by choice or financial need, but they will ultimately impact the state's healthcare system and other social services.

For the purposes of this report, we selected six comparison states that are geographic neighbors and partners in dealing with regional issues such as water and public land management. They are also competitors in the race to attract talent and new sources of jobs. Utah and Arizona have the highest rates of dependency across both children and older Arizonans.

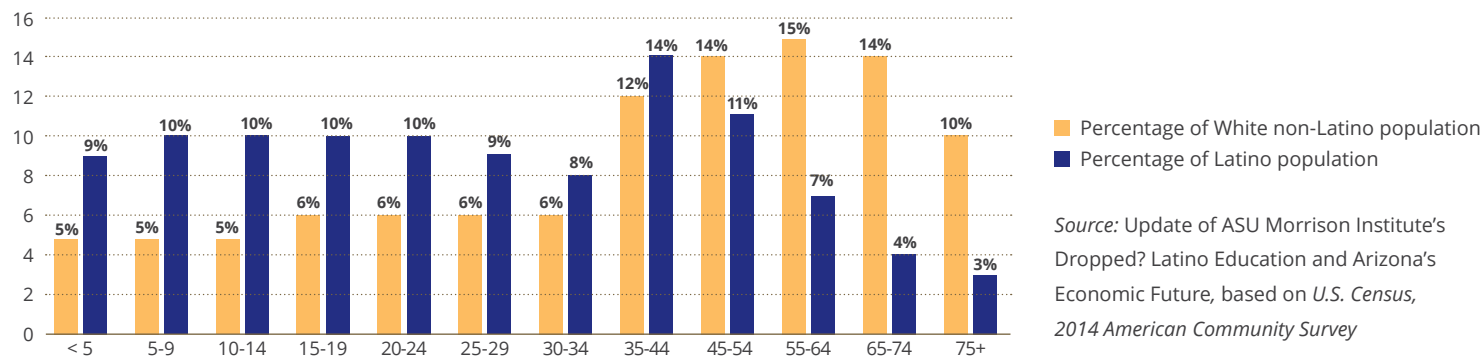
Age of Population	U.S.	AZ	CA	CO	NV	NM	TX	UT
Under 18	23.1%	24.0%	23.6%	23.2%	23.3%	23.9%	26.4%	30.8%
Millennials (18 to 34)	23.4%	23.3%	25.0%	24.7%	23.4%	23.3%	24.6%	26.2%
35 to 49 years old	19.3%	18.5%	19.9%	20.0%	20.3%	17.7%	19.9%	18.4%
Baby Boomers (50 to 69)	24.5%	23.4%	22.7%	24.1%	23.9%	25.0%	21.4%	18.2%
70+	9.7%	10.8%	8.5%	8.1%	9.1%	10.1%	7.6%	6.7%
Median Age	37.7	36.9	36.0	36.3	37.4	37.2	34.3	30.5
Age Dependency Ratio	60.2	66.7	57.3	56.2	59.9	64.6	61.0	68.9
Child Dependency Ratio	37.0	40.2	37.1	36.4	37.3	39.5	42.5	52.0
Old-Age Dependency Ratio	23.2	26.5	20.2	19.8	22.6	25.1	18.5	16.9

Source: U.S. Census, 2014 American Community Survey

Arizona has been a diverse state since pioneer days and we're becoming more so.

- Between 2001 and 2010, Arizona's Latino population grew by 46.3% compared to 17.3% for Arizona's non-Latino population.
- U.S. Census demographers expect the number of minorities from all ethnic populations in Arizona to exceed the number of Whites by 2028. The U.S. will become a majority-minority nation sometime between 2040 and 2050.

AGE DISTRIBUTION OF ARIZONA RESIDENTS BY ETHNICITY, BY PERCENT, 2014



Source: Update of ASU Morrison Institute's Dropped? Latino Education and Arizona's Economic Future, based on U.S. Census, 2014 American Community Survey

Latinos represent 30.3% of Arizona's total population and 43% of all K-12 students.

U.S. Census, American Community Survey

FACTS: Productivity, Prosperity and Poverty

3. Arizona's productivity and prosperity are declining compared to U.S. averages and those of many neighboring states.

In a new report on Arizona's economic competitiveness, ASU researcher Tom Rex assessed our state on a number of indicators, including productivity, prosperity and such critical factors as location, the quality of our labor force and physical infrastructure, and the overall cost of doing business in Arizona.

In his conclusion, Rex notes that Arizona's competitiveness is mixed, consistent with the middle-of-the-states rank we receive from the most reliable business studies. We generally compare favorably on business costs, with the exception of business taxes, and on our overall quality of life. The state of our infrastructure is somewhat positive but at risk due to declining investments. Arizona compares poorly on the quality of our labor force. Rex goes on to conclude that the goal of economic development is to raise prosperity, not simply to create jobs. As a region's workforce becomes more highly skilled, productivity increases will lead to higher wages among all workers.

Source: "Overview of Economic Competitiveness: Business and Individual Location Factors, with a Focus on Arizona," November, 2014

24%

believe the next generation of Arizonans will have a better standard of living than we have today.

Source: Gallup Arizona Poll

	U.S.	AZ	CA	CO	NV	NM	TX	UT
Population	318,857,056	6,731,484	38,802,500	5,355,866	2,839,099	2,085,572	26,956,958	2,942,902
General Measures								
Nominal GDP 2014 ¹	\$17,316 B	\$284 B	\$2,312 B	\$307 B	\$132 B	\$93 B	\$1,648 B	\$141 B
Real GDP Growth 2011-2014 ¹	6.3%	4.3%	7.8%	9.2%	1.6%	2.6%	17.8%	7.6%
Unemployment Aug 2015 ²	5.1%	6.3%	6.1%	4.2%	6.8%	6.7%	4.1%	3.7%
Productivity								
Average Wages (2013) ¹	\$50,012	\$46,797	\$57,608	\$51,537	\$41,800	\$45,356	\$50,643	\$42,693
Prosperity								
Adjusted* per capita GDP ¹	\$54,307	\$43,474	\$53,049	\$56,025	\$47,369	\$46,918	\$63,222	\$49,435
Rank, 50 States & DC		47	25	18	38	40	9	35
Adjusted* per capita Income 2014 ¹	\$46,129	\$39,027	\$44,621	\$47,681	\$40,812	\$39,584	\$46,976	\$38,854
Rank, 50 States & DC		50	31	22	44	48	26	51
Employment to Population Ratio (2014) ²	59.2%	55.6%	57.7%	64.6%	58.2%	53.6%	61.9%	65.4%
P2P Employment ³	44.1%	40.0%	41.0%	48.4%	40.7%	39.1%	46.1%	48.5%

*Adjusted for the cost of living using regional price parities.

³ Payroll to population (P2P) refers to the percentage of the workforce that is employed 40 hours per week by an employer other than self. Gallup research finds that P2P percentages align closely with per capita GDP, per capita personal income and unemployment.

Sources:

¹ U.S. Department of Commerce, Bureau of Economic Analysis

² U.S. Department of Labor, Bureau of Labor Statistics

³ Gallup Analytics, U.S. Daily Tracking

4. One in five Arizonans lives in poverty and the per capita income of Arizonans has declined.

A national discussion was launched by Robert Putnam with the release of *Our Kids: The American Dream in Crisis*. In his latest study, Putnam examines the state of upward mobility, widening income gaps and growing poverty in America. He suggests they are bringing profound changes to family life, neighborhoods and schools in ways that give big advantages to children growing up at the top of the socio-economic pyramid and make it ever harder for those below to work their way up.

	U.S.	AZ	CA	CO	NV	NM	TX	UT
Poverty Rate								
All people	15.5%	18.2%	16.4%	12.0%	15.2%	21.3%	17.2%	11.7%
Children < 18	21.7%	25.6%	22.7%	15.4%	22.0%	29.5%	24.6%	13.3%
Adults 18 to 64	14.6%	17.6%	15.3%	11.8%	14.3%	20.1%	15.1%	11.8%
65 years and over	9.5%	9.4%	10.6%	7.1%	8.3%	13.2%	10.9%	6.7%

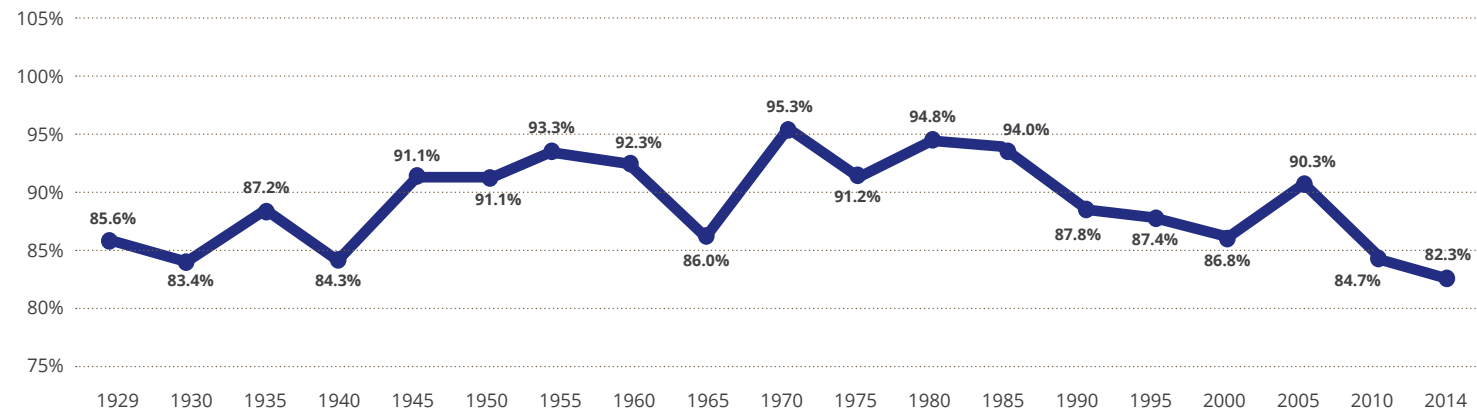
Source: U.S. Census, 2014 American Community Survey

Arizona's increasing poverty rate is reflected in the state's loss of per capita income over time.

Overall, Arizona's per capita income has fallen significantly since the 1980's.

Arizona's reliance on growth, construction and real estate over decades has created a "boom or bust" economy in the state that is extremely sensitive to economic downturns. A second factor is the overall loss since the 1940's and 1950's of high-tech, high-wage manufacturing jobs. As a share of the economy, the peak was around 1970 in Arizona for high-tech manufacturing.

Per Capita Income in Arizona as a Percentage of the National Average



U.S. Department of Commerce, Bureau of Economic Analysis, 2014

At the heart of Putnam's case is that public education today and the way it's funded are accelerating the advantages of class. The children of the affluent begin school better prepared—most attended quality preschools and their parents stay actively involved throughout their educational experience. They also attend schools that are better financed. Per-pupil funding levels are set by the state, but schools in wealthier communities are able to increase funding by voter approval of local school bonds and the use of charitable tax credits by district residents.

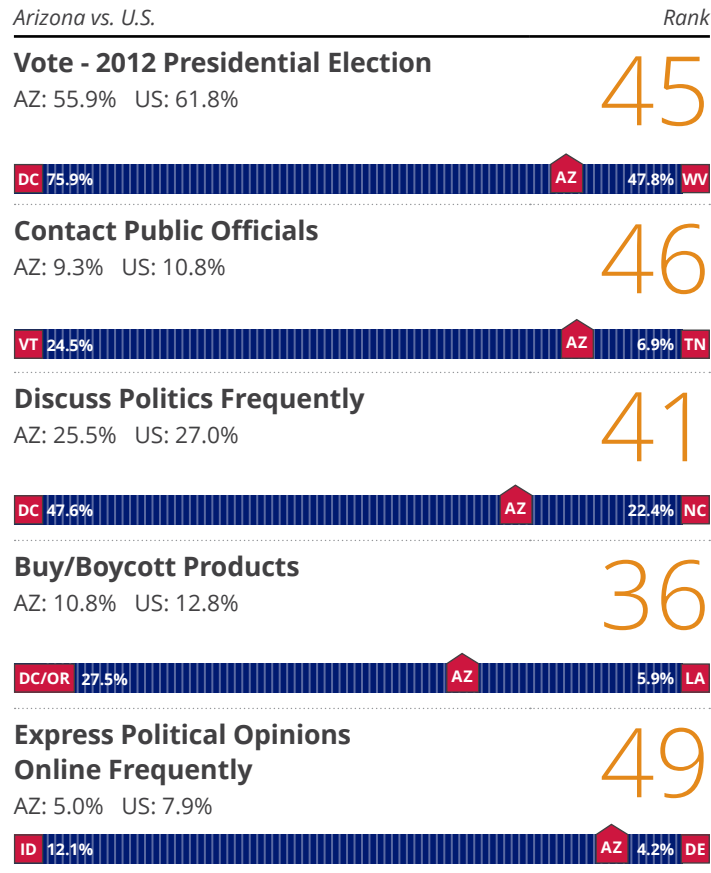
Far more Arizona students live in lower-income neighborhoods than in more affluent ones. They make up a much larger percentage of our potential workforce and are key to Arizona's prosperity and economic competitiveness in the future.

FACTS: Citizen Participation in Arizona

5. Arizona citizens are not as fully engaged as we must be if our goals are to be realized.

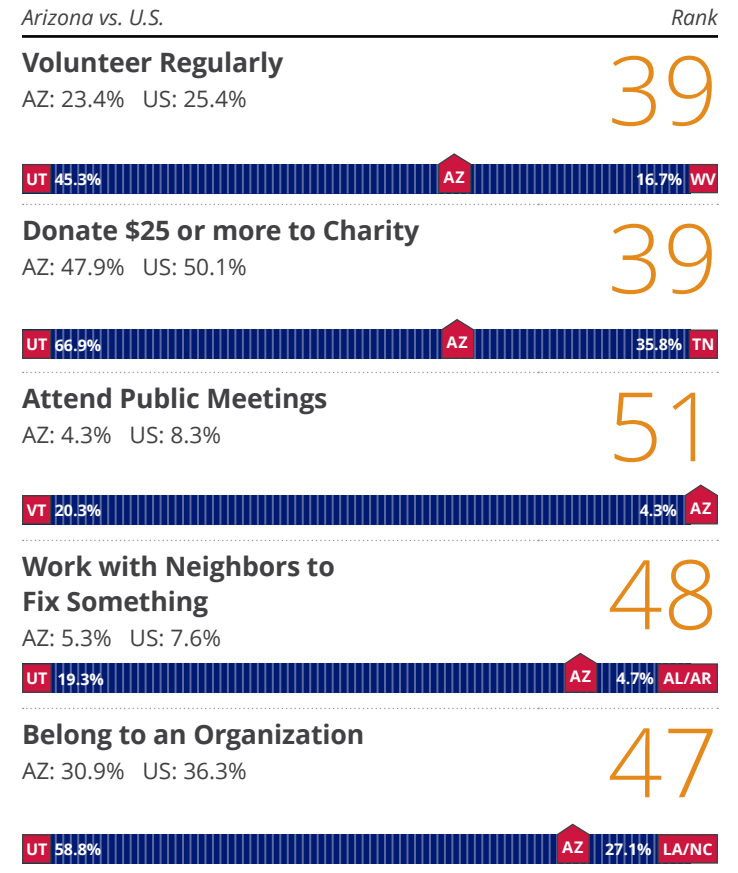
One key insight gained from the Gallup Arizona Poll was that citizens are deeply connected to the state as a “place” to live but don’t feel connected to one another. CFA established a new partnership with the National Conference on Citizenship (NCoC) in 2009 to begin benchmarking Arizona on a wide range of behaviors to learn more. The result is the Arizona Civic Health Index. The following results indicate how Arizona compared to other states in 2013.

ACTIONS THAT INFLUENCE GOVERNMENT



Source: Arizona Civic Health Index, 2013

ACTIONS THAT BUILD COMMUNITY



Arizona leaders considered exemplary by critical readers include:

LEADERSHIP



Kimber Lanning



Don Budinger



Jane Hull

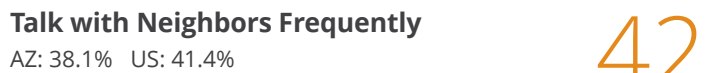
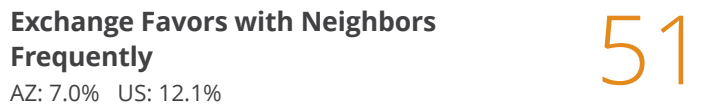
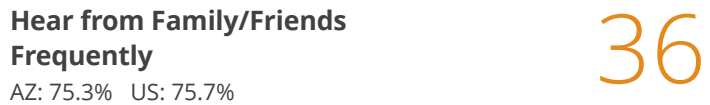
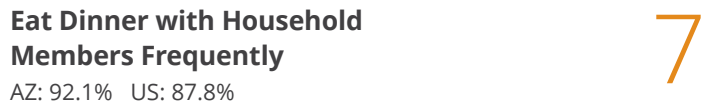
12%

of Arizonans believe the people in their community care about one another.

Source: Gallup Arizona Poll

ACTIONS THAT BUILD SOCIAL COHESION

Arizona vs. U.S. Rank



GALLUP ANALYTICS

CFA began a new partnership with Gallup in 2014 to gain access in real time to all the information captured regularly from four ongoing studies: the Gallup World Poll, Gallup U.S. Daily Tracking, the Gallup-Healthways Well-Being Index and Gallup *State of the States* reports on special topics. The Gallup World Poll does not provide state level statistics. But it does track how Americans perceive our country's institutions and how our perceptions differ from the world at large. Nation-to-nation data is also available.

THE WORLD ACCORDING TO GALLUP

	U.S.	World
Public Sector		
Confidence in honesty of your national elections	40%	45%
Corruption widespread in government	75%	71%
Confidence in national government	35%	53%
Confidence in nation's judicial system and courts	59%	53%
Confidence in military	91%	76%
Private Sector		
Confidence in financial institutions and banks	53%	59%
Corruption widespread in businesses in this country	61%	67%
Freedom of media in this country	85%	64%

Source: Gallup World Poll, Gallup Analytics, 2014

10.9%

of Arizonans have a great deal of confidence in state government's ability to handle problems compared to 10.5% for the nation.

Gallup Analytics, *State of the States*, 2013



Michael Crow



Courtney Klein



Bill Post

LEADERSHIP

PROJECTIONS: Workforce Development and Jobs

6. 68% of all Arizona jobs will require post-secondary education and training by 2020.

The Center on Education and the Workforce at Georgetown University analyzes and reports on job growth and the education requirements to support it.

Current projections indicate:

- By 2020, 35% of Arizona's job openings will require at least a Bachelor's degree.
- 30% will require some college, an associate's degree or industry-certified training with high market value.
- 36% will not require training beyond a high school diploma.

Source: Recovery: Job Growth and Education Requirements through 2020, Center on Education and the Workforce, Georgetown University 2013

How Arizona Compares

	U.S.	AZ	CA	CO	NV	NM	TX	UT
Labor Force (age 25+)								
Less than H.S. diploma	13.1%	13.9%	17.9%	9.4%	14.9%	15.8%	17.8%	8.6%
High School graduate*	27.7%	24.3%	20.9%	21.9%	28.2%	26.4%	25.2%	23.0%
Some college or AA degree	29.2%	34.2%	29.5%	30.3%	33.9%	31.4%	29.2%	37.3%
Bachelor's Degree or more	30.1%	27.6%	31.8%	38.4%	23.1%	26.5%	27.8%	31.1%

**Includes equivalency. Source: U.S. Census, 2014 American Community Survey*

Arizona is fairly well-positioned for the **mid-skill job market** that requires at least some college, an associate's degree or advanced training that is industry certified in a high market value occupation. But mid-skill jobs are also vulnerable if new innovations make it possible to substitute technology for human labor or if they can be outsourced overseas.

The state has a strong community college system and a large network of Joint Technical Education Districts. CFA's objective is to help ensure that the education and job training the state delivers meet the increasing skill levels of Arizona's existing employers and other companies being recruited.

If current workforce projections are even close to accurate, the challenges will be greater for employers seeking high school graduates and college graduates with a bachelor's degree or more.

30

Arizona's national rank for adults age 25 or older with a Bachelor's degree or more

Use U.S. Census, 2014 American Community Survey



Richard Mallery

LEADERSHIP: Personal Commitment | A NEW ECONOMIC CLUSTER

Richard Mallery was a man on a mission when he began his efforts to establish a strong biomedical presence in Arizona. His vision to bring the Translational Genomics Research Institute (T-GEN) to Arizona captured the attention of Greater Phoenix Leadership and other statewide leadership groups, including the Rodell Foundation, the Virginia G. Piper Charitable Trust, the Salt River Pima Maricopa Indian Community and Governor Jane Hull. Building on the Bio-Science Roadmap created by the Flinn Foundation, the momentum encouraged the three state universities to focus revenues from Prop 301 on biomedicine, which helped create a new high-wage economic cluster. Today Arizona is a recognized center for health care research and practice with an established array of top-ranked hospitals and specialty research facilities.

Unless leaders in all sectors agree on a long-term action plan, Arizona's economic base will continue shifting to lower-wage jobs.

The Greater Phoenix region has a challenging problem. According to a spring 2015 *Phoenix Business Journal* article, the economic base of the region is shifting from advanced high-tech manufacturing jobs that require high level skills to jobs more in line with a low-wage service economy.

Chris Camacho, president and CEO of Greater Phoenix Economic Council, comments in the article that the solution begins with workforce development.

"If we are to attract high-wage jobs, we need a qualified workforce and a top-class education system from Pre-K through graduate school."

Over the past 30 years, the number of high-wage jobs in advanced industries has declined from 23% of all Arizona jobs to 15% according to the Maricopa Association of Governments.

The Brookings Institute recently collaborated with GPEC to discover how Arizona was recovering from the recession.

They found several dramatic trends:

- The housing market in Greater Phoenix was among the nation's leaders by 4th quarter 2014—up 44.4% since the lowest point in the recession.
- The region's overall economic recovery was not as strong. Output growth was ranked 31st among metros.
- Without serious intervention, Arizona will return to its traditional "boom or bust" model built on real estate, retail, climate and quality of life attractions.

Another study released by the National Bureau of Economic Research (NBER) finds that the most vulnerable jobs among both blue-collar and white-collar occupations will be routine jobs that can be either replaced with new technology or outsourced to places with low labor costs. The workers of the future must be able to bring high level problem-solving, communication and digital skills.

NBER calls this phenomenon "job polarization" and it does not happen gradually. According to its research, every recession since the 1980's has shown a marked decrease in mid-skill jobs that are routine and repetitive with some jobs not returning.

Arizona is at a crossroads. We can become more economically competitive with states like Colorado. Or we can remain a relatively low-wage state that offers a great climate and a lower cost of living.

Increasing numbers of Arizona's talent pool may choose self-employment.

The two largest population groups in Arizona are younger and older adults. Several business studies predict a growing number of highly skilled Millennials are less interested in climbing the corporate ladder than in building their own ladder. This is the age of entrepreneurship and they want to explore it.

Equally large numbers of Baby Boomers may be more interested in bringing their considerable skills to freelance consulting work after long careers. They may not be willing to completely retire out of either choice or necessity. Other highly skilled Arizonans, especially in fields such as construction and other highly skilled trades, may have already moved on to part-time, project-based or self-employment due to the recent recession.

40%

of Arizonans are employed full-time by an employer compared to 44% nationwide.

Source: Gallup Analytics, U.S. Daily Tracking, 2014



Skip Rimsza
1994-2004



Phil Gordon
2004-2012



Greg Stanton
2012-Present

LEADERSHIP: Long-term Action across Administrations | URBAN RENAISSANCE

The combination of the Biomedical Campus and ASU's Downtown campus took the concerted efforts of three mayors, several university presidents, a long list of leaders in all sectors and the willingness of Phoenix residents to support the vision. The urban center of the state has been transformed into a major hub for biomedical research, select UA, ASU and NAU programs and thousands of students living and working together. With all the surrounding cultural and sports amenities, Downtown Phoenix is becoming the source of new jobs, new energy and an urban vibe.

PROJECTIONS: The Education Debate

Education is one of the most widely discussed issues in Arizona, but a complete and accurate picture of our education system is rarely presented or understood by the public. Mostly, the education debate in Arizona focuses on a lengthy list of input measures such as whether we rank 47th or 50th in per pupil funding in the K-12 system or how our budget cuts to higher education compare to other states.

Increasingly, a number of highly performing schools are showcased as representative of the state's K-12 education system. The schools being featured are excellent but they serve a relatively small percentage of Arizona's K-12 students. Very little mention is made of the growing strength of higher education in Arizona—both the community colleges and the public universities.

Arizonans lament the steady loss of education funding, but neither they, nor public and private leadership statewide, have developed a plan for a comprehensive long-term solution.

7. Unless Arizonans focus on results for all students with a comprehensive long-term funding plan, the debate over education will continue with little or no progress made.

Arizona citizens spoke clearly about education in the Gallup Arizona Poll. They want all students to have the opportunity to be prepared for success in life as engaged and contributing members of society. The level of education attained by the people who live here is the strongest predictor we have of our future prosperity and civic health.

EDUCATION CHALLENGES

DEMOGRAPHICS

Arizona is historically a young and diverse state and will become more so in the future.

K-12:

- 1,116,014 students enrolled (Oct 2014).
- 43% of K-12 population is Latino.
- 58% of K-12 population qualify for the federal National Lunch Program.

Source: U.S. Census, Public Education Finance Data, 2015

Community Colleges:

- 334,056 credit students and 51,060 non-credit students enrolled in 2013-2014.
- 48% of the students are White and 52% minorities.
- The average student age is 27.

Source: Maricopa Community Colleges, 2015

Public Universities:

- 152,933 enrolled in 2014-15.
- 25,785 bachelor's degrees and 7,632 master's degrees awarded last year.
- \$502.7 million provided in student aid.
- University student average college loan debt is \$22,903.

Source: Arizona Board of Regents, 2015

46.5%

of Arizona's public high school graduates are eligible for admission to the state's public universities.

Source: Arizona Board of Regents, 2015

50.5%

of Arizona's public high school graduates enroll in any postsecondary institution immediately after graduation

Source: Arizona Board of Regents, 2015

FUNDING

Statewide investments in education on all levels are at or near the lowest 5% in the nation across the education system.

K-12:

- The state's per pupil funding places Arizona among the bottom five states at \$7,205, compared to the national average of \$10,700. Utah (\$6,555) and Idaho (\$6,791) spend the least. Oklahoma and Mississippi round out the bottom five.

Source: U.S. Census, Public Education Finance Data, 2015

Community Colleges:

- Maricopa and Pima Community College Districts lost all state funding as of July 1, 2015. The Maricopa Community College District alone, one of the nation's largest, lost \$68 million in state funding over the last seven years. Primary funding for community colleges remains property taxes and tuition. Arizona community colleges pursue the legislative ability to seek the same kinds of grants and contracts available to universities.

Source: Maricopa Community Colleges, 2015

Public Universities:

- Arizona's public universities have been cut \$463 million since fiscal year 2008, a 51% drop in per pupil funding. The universities have been forced to raise tuition but have also increased efficiencies and worked to increase financial aid and develop lower-cost pathways to a bachelor's degree. The state will remain a critical investor and the Board of Regents will continue to seek a recommitment of state general fund dollars to support Arizona students.

Source: Arizona Board of Regents, 2015

ACHIEVEMENT GAPS

Closing the achievement gap between students from different ethnic and socio-economic populations is one of Arizona's greatest challenges.

In 2001, the Morrison Institute for Public Policy at ASU released a ground-breaking report entitled *Five Shoes Waiting to Drop on Arizona's Future*. The report urged Arizonans to deal with the growing gap in education achievement between Latino and non-Latino White students. Ten years later, the Institute released a second call to action entitled *Dropped? Latino Education and Arizona's Future*. The Institute again urged all Arizonans to deal with a problem that seriously challenges the state's long-term prosperity.

Little progress has been made. Of all students five to 17-years old, 25% live in poverty. They are highly disadvantaged in our K-12 education system. They start school less prepared, often don't have the level of parental advocacy needed and the inequities in school funding put them at a further disadvantage. At this time in the state's history, poverty predicts the level of education that students will achieve and all that means in terms of lifelong earnings and economic security.

10.7%

of Arizona's public high schools send one-half of all graduates going on to any postsecondary education institution.

Source: Arizona Board of Regents, 2015

225

of Arizona's 448 public high schools send 10 or fewer students to any postsecondary education institution after graduation

Source: Arizona Board of Regents, 2015



Ira Fulton



Eddie Basha



Lisa Lovallo

LEADERSHIP

85%

of community college students remain in Arizona throughout their working lives.

Source: Arizona Community Colleges

66.2%

of Arizona's university graduates find jobs in Arizona immediately after graduation. 20 years later, only 35.6% are still working in Arizona.

Source: Arizona Board of Regents

EDUCATION RESULTS

GRADUATION RATES

K-12:

- Arizona ranks 43rd in the nation for the state's 4-year high school graduation rate of 75.1%. Source: Diplomas Count

Arizona Community Colleges:

- Arizona community colleges awarded 14,221 AA degrees in 2013-14 and 12,261 industry-related certificates in 2013-14.
- A total of 261,602 students pursued but did not complete a credential during the reporting year.

Arizona Public Universities:

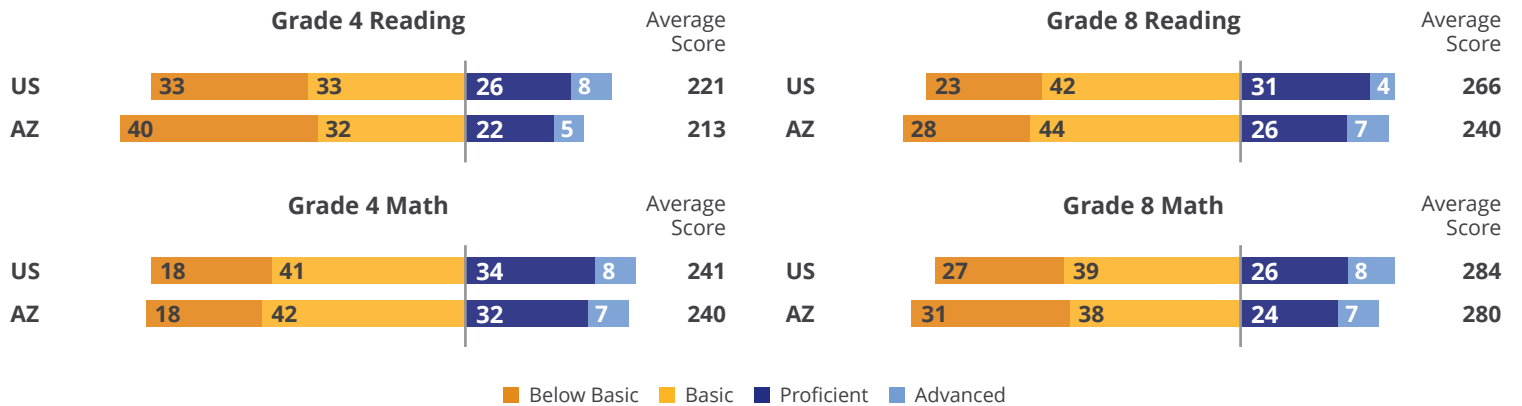
- The graduation rate for Arizona's public universities is 59.8% (2014-15).

NATIONAL BENCHMARKS

The National Assessment of Educational Performance (NAEP) provides the only national data available that compares results on a state-by-state basis for student achievement at 4th and 8th grade levels. NAEP assessments are administered uniformly across the nation. The results let us see how Arizona students are doing compared to other states and the nation.

AZ MERIT

The state's new education proficiency exam was first administered in 2014 to assess how students are doing in meeting Arizona's College and Career Ready Standards, implemented in 2011. Early results indicate the majority of Arizona students fall short on critical reading and math proficiency skills, which aligns closely with NAEP results.



ONGOING CHALLENGES

Education Attainment By Poverty And Ethnicity (25 Years And Older)

	Total Population		Latino		Non-Latino White		Native American		African American		Asian	
	AZ	U.S.	AZ	U.S.	AZ	U.S.	AZ	U.S.	AZ	U.S.	AZ	U.S.
Educational Attainment												
Less than H.S. diploma	13.9%	13.1%	34.6%	34.7%	5.9%	8.0%	23.4%	20.7%	10.6%	15.6%	13.9%	13.7%
High School graduate	24.3%	27.7%	27.2%	27.2%	23.3%	28.2%	33.5%	31.9%	24.2%	31.6%	15.1%	15.5%
Some college or AA degree	34.2%	29.1%	26.5%	23.8%	37.3%	30.2%	33.6%	33.5%	40.7%	33.1%	20.4%	19.2%
Bachelor's Degree or more	27.6%	30.1%	11.7%	14.4%	33.6%	33.6%	9.6%	13.9%	24.5%	19.7%	50.6%	51.5%

*Table does not include all race/ethnicity combinations available. Source: U.S. Census, 2014 American Community Survey

EDUCATION AND CIVIC HEALTH

The level of education achieved by Arizonans is just as important to our civic health as it is to our economic prosperity and quality of life. Education drives 12 of 16 indicators tracked by the Civic Health Index based on U.S. Census data. The following five are representative.

Citizen Participation by Education in Arizona (2012)

	Overall		No HS Diploma		HS Diploma		Some College		BS Degree or Higher	
	AZ	U.S.	AZ	U.S.	AZ	U.S.	AZ	U.S.	AZ	U.S.
Vote	55.9%	61.8%	27.0%	38.0%	43.9%	52.6%	62.1%	64.2%	71.7%	77.1%
Volunteer	23.1%	26.1%	6.6%	9.0%	17.6%	16.7%	23.3%	27.7%	36.8%	39.8%
Attend Public Meetings	4.9%	9.3%	0.9%	2.8%	2.7%	5.2%	5.2%	9.4%	8.7%	15.3%
Work with Neighbors to Fix Something	6.0%	8.4%	0.9%	2.9%	8.4%	5.0%	6.9%	8.8%	7.4%	13.1%
Give to Charity—\$25 or More	53.4%	55.2%	21.2%	30.7%	41.4%	45.5%	61.6%	57.8%	72.3%	71.1%

Source: Arizona Civic Health Index, 2013

THE CONSTITUTIONAL IMPERATIVE

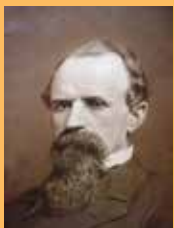
The foresight and commitment of Arizona's early lawmakers is remarkable. A small and largely rural population living on the edges of the frontier established an education system that spanned all levels—from the state's first elementary schools to three institutions of higher education. And it happened decades before statehood.

Very few early lawmakers were born in the Arizona Territory, yet they produced one of the nation's most aggressive constitutions in support of education. While it provides little detail on how to fund most state responsibilities, it is explicit regarding public education. The constitution requires education at all levels to be "as nearly free as possible" for students. It stipulates that revenues from state trust lands be used for this purpose and further directs the Arizona legislature to make such appropriations, to be met by taxation, to insure the maintenance of the state's education system and its development and improvement.

52.9%

of Arizonans believe their public school system prepares students to get a good job, compared to the national average of 62.0%.

Source: Gallup Analytics, State of the States, 2013



Anson P. K. Safford

LEADERSHIP: Foresight and Values | EDUCATION

Anson P. K. Safford was Arizona's third Territorial Governor. Born in Vermont, Safford became known as the "Father of Public Schools" in Arizona. Self-educated, he won passage of a property tax in 1871, against heavy odds, to finance the creation and operation of a school system. Safford established the territory's first public school in 1872 in Tucson and, by 1877, he was able to report that at least 1,450 of the 2955 children counted in the 1876 U.S. Census could read and write. Safford personally delivered books to Arizona's first schools from his buckboard. Succeeding territorial governors continued the tradition. In 1885, the 13th Territorial legislature established the University of Arizona and the Normal School that would become Arizona State University. In 1899, the legislature established a second Normal School in Flagstaff that would become Northern Arizona University. The Arizona Constitution stands as a remarkable commitment to education.

Arizonans want water management plans for all regions of the state, and they want the natural environment preserved.

Source: Gallup Arizona Poll

PROJECTIONS: Water, Transportation and Trade

In the Southwest, drought is not a possibility—it's a probability. We're either in a drought or preparing for the next one. Arizona has done arguably the best job of any state on issues of water conservation and management. Throughout our history, a series of farsighted leaders have advocated at the national level to ensure our water rights and executed at the state level to deliver our water supplies. But when the issue is something as dynamic as water, there is no resting on our past successes.

8. Water and other resource management issues will grow in urgency throughout Arizona and the west.

Arizona is one of the driest states in the nation and also one of the best prepared to deal with the complexities and planning required to ensure that water supplies meet water demands. Moving forward, Arizonans need a better understanding of water management—the interdependent relationships we have with the federal government, tribal governments, neighboring states and international corporations.

What is Arizona doing right?

- Conserving water: Arizona water use is no higher today than it was in 1957 when our population was approximately 1 million.
- Storing water: Since 1996, the state has stored the equivalent of two-years of Central Arizona Project water.
- Long-term planning: The Arizona Department of Water Resources released *Arizona's Next Century: A Strategic Vision for Water Supply Sustainability* in 2014 to identify the gaps between water supplies and water demand, and how to address them.
- The Water Resources Research Center at the University of Arizona is a critical source of research.
- The Kyl Center for Water Policy was established at ASU's Morrison Institution in 2014, a welcome new resource.

What are some of the challenges?

- The Colorado River, in-state lakes and reservoirs, and groundwater supplies are all shrinking.
- Some regions and municipalities of Arizona are much harder hit by the drought than others. Many of the hardest hit may not be able to finance the water supply projects that are estimated to cost, collectively, in the billions.
- Forest management is a critical factor in watershed management.



LEADERSHIP: Working across the Aisle | WATER

For more than 100 years, Arizona's Congressional delegations, governors and leaders in all sectors succeeded in building dams and canals, securing water rights and making rapid growth possible in an arid state. The delegations included some of the most effective leaders in our history—John Rhodes, Carl Hayden, Morris and Stewart Udall, Stan Turley and, more recently, Jon Kyl. The Salt River Project and the Central Arizona Project solidified Arizona's capacity to manage its water resources. Passage of the Groundwater Management Code in 1980 under the leadership of Governor Bruce Babbitt was selected by the Ford Foundation as one of the 10 most innovative programs in state government. This legislation again confirmed that Arizona leaders consistently provide the best water management and conservation in the nation.

9. The state of Arizona's infrastructure is still positive but at serious risk due to declining investments.

Several recent reports provide a great deal of information about the state of Arizona's infrastructure and many suggestions for how best to address the challenges and capitalize on the opportunities. .

The Arizona Department of Transportation (ADOT) released its long-range transportation plan (2010-2035) in 2011. The plan estimates that Arizona faces a daunting challenge: How to prioritize \$89 billion dollars in transportation needs over the next 25 years with \$26 billion in expected revenues. Federal and state funding declined sharply during the Great Recession and show no signs of recovering.

Arizona Forward released *Are We There Yet? The Role of Transportation in Driving Arizona's Global Economy*, in 2012. The report includes suggestions for how Arizona can close the \$63 B gap between what ADOT needs to maintain and expand the state's infrastructure and its current projected funding.

One frequently discussed suggestion is increasing the gasoline tax. Federal and state gas taxes are the leading source of revenue for transportation. Arizona has not raised its gas tax in decades and the taxes are not indexed to either fuel costs or inflation. Only seven states have lower gasoline taxes than Arizona.

ADOT released *Arizona's Key Commerce Corridors: Local Jobs, Global Markets* in 2014. The report focuses on the importance of infrastructure to capitalizing on the state's unique location. Arizona is ideally positioned to connect the state's producers to key markets in southern California, Texas, Mexico, the Pacific Northwest and Canada. The plan proposes \$20 B in improvements over the next 20 years to drive high-quality job creation.

Arizona Town Hall held its spring 2015 meeting on transportation. The discussion focused on key facts, trends and how to pay for what Arizonans believe we need. It also pointed out a degree of urgency if Arizona is going to be economically competitive.

- Our transportation financing model at both federal and state levels is unsustainable.
- Arizona is ill-prepared for the mobility needs of a rapidly growing older population.
- Our rural and tribal areas remain poorly served.
- Federal and state gas taxes must be raised and state funds intended for transportation cannot continue being swept into the State General Fund.
- ADOT's Key Commerce Corridors plan should be funded.

The challenge that confronts Arizona is not a lack of understanding. It's a lack of funding



Doug Pruitt

LEADERSHIP: Regional and Local Action | TRANSPORTATION

In 2004, voters in Maricopa County approved Proposition 400, extending the funding for county-wide transportation projects from 2006 to 2026. **Doug Pruitt**, chairman of Maricopa 2020, played a key role in organizing the business community and working closely with the Arizona legislature to ensure that voters had the opportunity to make a big decision. Citizens spoke and, in recent years, Prop 400 funding represented one of the few sources of funding available for improvements to Arizona's infrastructure. This pattern continued in 2015 when the City of Phoenix asked voters to pass a 0.4% sales tax increase to support transit needs in the state's urban hub. Prop 104 is the foundation for a \$31.5 B multi-modal plan that Mayor Greg Stanton and the city council hope to fully fund through federal grants and passenger fares.

PROJECTIONS: The Primary Vote

27%

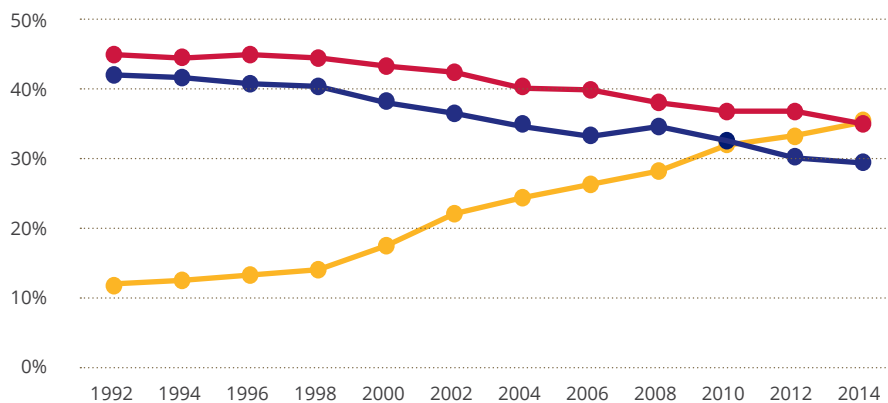
of Arizona's registered voters participated in the 2014 primary, the lowest turnout in over 50 years.

Source: Arizona Secretary of State's Office, 2014

10. The primary election in Arizona will continue to determine general election results in most cases.

Three factors combine to make the primary election so important in Arizona—lack of competitive districts, an increasing number of registered Independents and low voter turnout. The result is that our elected officials are voted into office by smaller numbers of people.

Voter Registration Trends

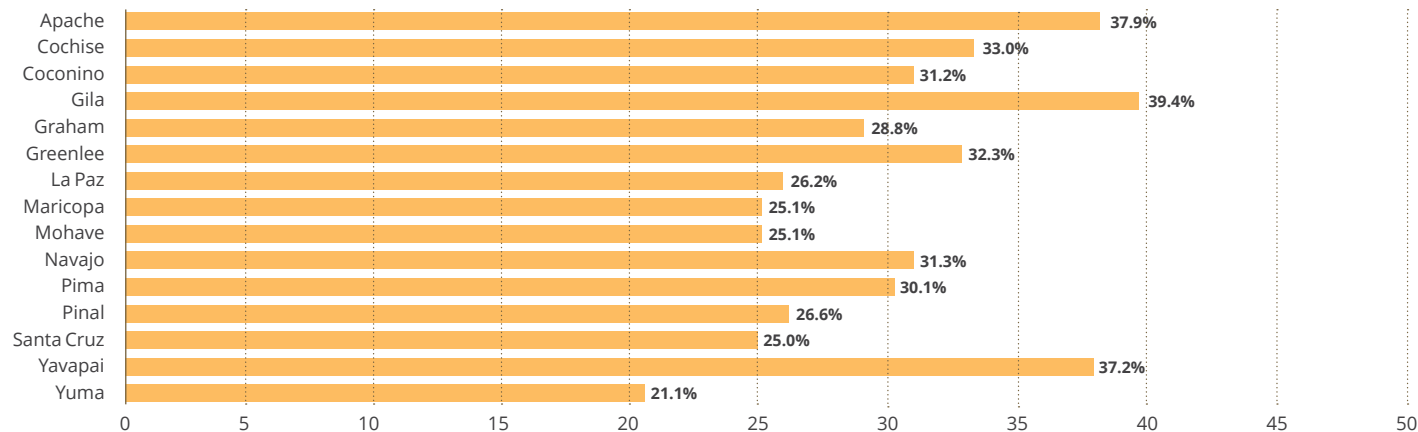


Current Voter Registration:

Independents: 34.9%
 Republicans: 34.8%
 Democrats: 29.5%

Source: Arizona Secretary of State's Office, 2014

2014 Midterm Primary: Voter Turnout by County



Source: Arizona Secretary of State's Office, 2014

Arizona leaders considered exemplary by critical readers include:



Tracy Taft



Rufus Glasper



Betsey Bayless

LEADERSHIP

UNCERTAINTIES: Constraints and Choices

Uncertainty and Instability—economic, political and social—have become the chief characteristics of our time and how we respond will have a big impact on the state’s future. As with all CFA reports, we asked a large number of critical readers to review an early draft and to make suggestions and comments. More than 70 leaders from around the state provided valuable feedback. We also asked the readers for their thoughts on five important questions.

11. What are the constraints to visionary leadership today and what needs to change?

Many critical readers commented that progress cannot be made in one-year budget sessions or two to four-year election cycles. The issues that confront Arizona are complex, expensive and require a sustained level of investment across more than one administration. Other challenges cited frequently include term limits, the two-thirds majority required for a tax increase and politics largely driven by a few large campaign donors.

- “We don’t lack visionary leaders; we lack leaders with the skills to make execution possible. Effective leaders today are those who know how to collaborate within and across sectors to move things along.”
- “A constitutional convention should be convened to take on these issues and others regarding the operation of the legislature.”
- “I am increasingly concerned about the actions of the legislature that interfere in the affairs of local governments, making visionary ideas illegal.”

12. What is the biggest challenge Arizona must confront to ensure its economic competitiveness?

Nearly all critical readers spoke to the importance of improving education in Arizona. Managing the state’s long-term water supplies and providing all Arizonans with a modern infrastructure were also mentioned frequently.

- “Arizona has not yet decided to compete with the rest of the world. We want the benefits of a global economy without taking the steps required to compete successfully in it.”
- “The main reason we have lost ground in recent years is that our state political leaders do not embrace the goals of its citizens. We have seen repeated examples of the business and nonprofit leadership coming together to move the state toward the Arizona we want, but the political leadership does not engage. The state has to be willing to invest in itself.”
- “If the poverty rate is not drastically reduced, Arizona’s quality of life and college education attainment will be abysmal. There is no greater challenge facing the state.”
- “Our leaders have no apparent or visible strategy.”

CFA asked the critical readers for their thoughts on five important questions.



Jeannette Maré



Tracy Bame



Jerry Colangelo

LEADERSHIP

“It might be time for a more honest public discussion about taxes.”

CFA Critical Reader

UNCERTAINTIES:

13. Will Arizona develop a long-term investment strategy?

Critical readers don't believe Arizonans have a good sense of what they pay in state and local taxes, how the dollars are used or what kind of return we are receiving from our investments. Several readers commented on the purchasing power of the Latino community and the benefits of our proximity to Mexico. Others commented on the state's 22 federally recognized tribal communities and the economic importance of their water rights, land holdings and other natural resources.

- “What level of service do we want in terms of education, roads and everything else? Which sources of public funding should we use? How much funding do we need?”
- “The issue here is leadership and finding the group of semi-permanent voices that are reasonable and powerful in the state. Think about Utah and the role played by the Mormon Church. Who can be this authoritative voice in Arizona that cares long-term about our future?”

14. How can Arizona provide a predictable legal path for all who live and work here?

Critical readers recognize this as a largely federal issue but Arizona is a border state with a high stake interest in doing what it can to resolve issues that can be addressed at the state level. They also commented that Arizona has always been a diverse state, yet somehow has been made to appear as rejecting its cultural heritage.

- “Elect individuals to the U.S. Senate and House who are pragmatic, reasonably independent from party politics and who vow to take on the issue.”
- “Engaging Latinos in voting is perhaps the best path to immigration reform.”
- “Why are Arizonans willing to accept refugees from Africa and the Middle East but so unwilling to accept Latin American refugees from similar peril.”

15. Will Arizonans begin to play a more active role in shaping the state's policies and future direction?

Critical readers spoke consistently about the need to educate citizens, especially younger voters, about the importance of voting in primary elections. They raised the issue of non-competitive congressional and legislative districting and the need to make the voting process less cumbersome for registered Independents to participate in the primary.

- Fewer and fewer people pay attention to the newspapers or attend a public meeting or town hall. We need to engage people where they are—on the internet or social media and in their neighborhoods.
- “The real issue is that many folks still do not have roots here emotionally. They are working hard at their jobs and have not had the time to pay enough attention to politics.”
- “I appreciate the need to instill a sense of shared obligation in Arizona. But many political districts are quite segregated economically and there is little understanding across different socio-economic groups that fosters a sense of shared goals and collective identity.”



COURTHOUSE PLAZA
PRESCOTT, ARIZONA

The Role of the Center



The Arizona We Want

Arizona citizens and leaders will actively pursue a common ROAD MAP for the future.

In 2009, CFA set an ambitious goal—build a citizens’ agenda for Arizona’s second century—a vision and set of goals that will mobilize people throughout the state and gain the consensus to survive transitions in leadership over time. The result was the Gallup Arizona Poll, the largest and most comprehensive survey ever undertaken in Arizona. We learned that Arizonans agree on more than they disagree, and that the state’s natural beauty and open spaces are considered its greatest assets. Arizonans have high expectations and the level of consensus found made it possible for Gallup to identify eight goals that describe The Arizona We Want.

KEY PARTNERSHIPS

EDUCATION

Expect More Arizona

JOB CREATION

Arizona Commerce Authority

ENVIRONMENT & WATER

The Nature Conservancy

INFRASTRUCTURE

We Build Arizona

HEALTHCARE

St. Luke’s Health Initiatives

YOUNG TALENT

Local First Arizona

CIVIC ENGAGEMENT

Arizona Town Hall

THE ARIZONA WE WANT—CITIZEN GOALS

Caring for the Economy

- Create quality jobs for all Arizonans.
- Prepare Arizonans of all ages for the 21st century workforce.

Caring for People

- Make Arizona “the place to be” for talented young people.
- Provide health insurance for all, with payment assistance for those who need it.

Caring for Communities

- Protect Arizona’s natural environment, water supplies and open spaces.
- Build a modern, effective transportation system infrastructure.
- Empower citizens and increase civic engagement.
- Foster citizen well-being and sense of connection to one another.

Since the release of *The Arizona We Want* report, the Center has worked to gain the consensus and needed momentum to translate the citizen goals into an action agenda.

2009-13

CFA traveled the state, speaking at events and giving more than 150 community presentations.

2010

Began partnership with the National Conference on Citizenship to publish the Arizona Civic Health Index, a set of 16 civic behaviors that benchmark Arizona annually with other states and the nation.

2010-11

Launched the *5 Communities* project to test what we were learning about civic leadership by challenging communities to come forward with their big ideas.

2013

Released *The Arizona We Want 2.0*, which reported on progress made in the state on each goal and suggested next steps.

2014

Recruited a lead partner for each goal to begin building a common action plan for the future.

2015

Incorporated SpeakOut Arizona into the Center as a commitment to community-based work.

Today more than 100 organizations are involved with CFA and The Arizona We Want. Together we are building partnerships, aligning action plans and leveraging resources to build working partnerships, align action plans and leverage resources to amplify the impact of our individual Initiatives.



“In many ways it seems the work the Center is doing is so simple. What do people want? Just ask them. Who can do the work? They can—but only if we create opportunities and get the barriers out of the way. The Arizona We Want is helping to re-invigorate democracy by inspiring Arizonans to identify very concrete systemic problems and seize the opportunities to make lasting change.”

Paula Ellis
Former VP for Strategic Initiatives,
John S. and James L Knight Foundation
NCoC Board of Governors
5 Communities Selection Panel

10%

of Arizonans believe their elected officials represent their interests.

Source: Gallup Arizona Poll

To support VISION 2025, The Arizona We Want and its partners will drive three primary goals:

1. Increase the responsiveness of government and other leaders to citizen goals.

The growing disconnect between citizens and the democratic process makes it difficult to maintain the public confidence and public will to support a healthy and fully functioning democracy that can deliver the results that Arizonans want. At the same time, the rapidly changing demographics of Arizona make it the perfect “laboratory for democracy.” We have a unique opportunity to model innovative ways to bring citizens and leaders together around a shared roadmap and common purpose.

2. Develop community-based exchanges that empower local efforts and create a collective voice in Arizona for all citizen goals.

Arizona has a tremendous asset in the talent available at the local level. People live next door to one another, attend the same school meetings, shop in the same stores, enjoy the same recreational activities and understand the day-to-day reality of dealing with their community’s future. Arizonans may feel powerless to have an impact on state or federal decisions but the barriers are not so high at the local level. The community exchanges will provide a platform for identifying opportunities to further connect people, to identifying successful community models and to providing information.

3. Engage and encourage young talent to come, stay and be participants in Arizona.

Arizona is young and increasingly diverse in its cultural, ethnic and economic characteristics. All CFA data confirms that while young Arizonans are socially connected, they are not likely to participate in the political and civic life of their communities. We have to find a way to engage and empower them. Millennials (19 to 34-year olds) represent 35 percent of the state’s working age population. We need their talent and their voice.



Ken Schutz

LEADERSHIP: Grass Roots Organization | OPEN SPACES

The 185,000 acres of mountain preserve that encircle Greater Phoenix make up the largest network of protected open space in any U.S. metropolitan area. It took decades of leadership at the local level to assemble this vast resource. The Central Arizona Conservation Alliance was launched three years ago by **Ken Schutz**, executive director of the Desert Botanical Garden, to study, restore and promote the preserves. The alliance includes the cities of Phoenix and Scottsdale, Maricopa County, ASU and other stakeholder groups that include hundreds of volunteers. The goal is to inspire a 21st century model of citizens working with leaders to manage this incredible recreation and education asset. The Central Arizona Conservation Alliance was one of the community efforts selected by a national panel in CFA’s *5 Communities* project.



*More than 200
Arizona schools
have participated
in Beat the Odds
since 2007.*

The Education We Need

Arizona's education system ensures EXCELLENCE and EQUITY for every student.

From its founding in 2002, CFA has focused on education as a key issue, with an emphasis on preparing all students for success in college, career and life. We have approached our education initiatives from the student perspective and we are greatly encouraged by what has been learned and accomplished. Both the research and the lessons learned have always led back to the need for a fundamental rethinking of how the educational experience for Arizona students should be redesigned and structured to maximize individual student success.

The Center's work to date demonstrates that Arizona is open to new ideas, change and innovation. It's possible to take a risk in Arizona, making it the ideal laboratory for incubating new ideas and providing proof of concept for innovations that can be taken to scale. Over the last decade, CFA has established a solid track record for moving innovation to implementation, and policy to practice.

BEAT THE ODDS

The Morrison Institute's 2001 report, *Five Shoes Waiting to Drop*, concluded that the achievement gap between Latinos and Whites represents a threat to Arizona's economic future. The Center responded in 2006 with a new study that asked one question—what does it take to get great results in a school with a student enrollment that is mostly Latino and mostly poor? The answers were revealing and transformed a set of research results into a multi-year program that provides leadership training and mentoring for principals at minority-intensive, low-income schools, particularly those serving Latinos. Beat the Odds delivers leadership training and materials designed to help principals improve student achievement, a peer group with whom they share and learn, plus a mentor. More than 200 Arizona schools have participated in the program since 2007.

MOVE ON WHEN READY

In 2008, CFA began working with other state and national organizations to create a new personalized pathway to high school graduation that would prepare every student for college level work. These discussions ultimately created an opportunity for Arizona to play a leading role when the Arizona legislature adopted Move On When Ready in 2010, allowing students to earn a recognized high school diploma that is designed to deliver the skills and knowledge needed to succeed in college and career. Earning the diploma is based on mastery, not "seat time."

Shortly after, CFA was selected by the Arizona Board of Education to lead the initiative in the state. Now in its fifth year of implementation, Move On When Ready is working with more than 20 diverse high schools, impacting more than 26,000 students statewide. The students are reflective of Arizona's demographics—nearly 50% are Latino and over half live in low-income households. The success of the program has involved sound, creative planning and solid collaboration between policymakers, schools, state agencies, the philanthropic and nonprofit community, higher education and national partners, including the National Center on Education and the Economy.

JOBS FOR THE FUTURE

Arizona joined the Pathways to Prosperity Network in June 2014, a multi-state initiative led by Jobs for the Future and Harvard Graduate School of Education. CFA was selected by the Governor's Office of Workforce Development to lead the Jobs for the Future effort in Arizona. The project focuses on developing robust career pathways that span grades 9-14 and provide young people with the skills and credentials to get started in a high-demand, high-growth field. CFA will begin the pathways work in the Phoenix and Tucson labor market regions, and will initially focus on the informational technology, energy, advanced manufacturing, and bioscience sectors. The pathways will bring together early career literacy, the integration of high school and college level work, and a continuum of work-based learning opportunities. CFA will develop and deliver the pathways in collaboration with employers, business groups, economic development organizations, high schools, community colleges, universities, and education agencies and organizations.

To support VISION 2025, CFA has established three goals for its work in education.

1. Incubate innovative solutions to the challenges that confront us in our education system.

Our current system of education is based on an industrial-era model that leaves some students behind, holds others back and leaves many disenchanted and disconnected. The world is changing at an unprecedented rate. We can only imagine the jobs that may exist in the future or the number of careers each person will pursue. What we do know is that the next generation needs to be able to adapt. This requires a new approach to education—new structures and new designs. In short, we need an infrastructure that encourages innovation and accelerates the rate at which it moves to implementation.

2. Empower student success through personalized college and career pathways.

Arizonans need to set their sights higher. For individuals, families and the state to prosper, every student needs the opportunity to attain a high-quality, rigorous K-12 education, plus some credential beyond high school—be it college, trade, technical or vocational school. So how do we prepare all young people for success in both postsecondary education and the world of work? Answering this question requires a fundamental shift in thinking about education today. We need to design education from the perspective of the student and desired outcomes in mind, taking into account what knowledge and experiences young people need to succeed in education, career and life. We must move beyond a “one size fits all” approach and embrace the development of comprehensive, multiple pathways that maximize individual student success.

3. Equip school leaders to help all students succeed.

We must seize the opportunity to secure our state’s future by raising the bar, closing achievement gaps, and increasing educational attainment for all students. As the fastest growing demographic in our state and the majority of all public school students in grades K-8, Arizona needs to focus on closing the Latino educational achievement and degree attainment gaps. A critical link exists between student success and a strong school principal. Our school leaders need the resources and training necessary to close achievement gaps at every level. This means increasing achievement for struggling students, while also making certain that middle and high-achieving, low-income and minority students excel academically.

35%

of young adults in Arizona ages 25 to 34 hold at least an Associate’s degree compared to the national average of 42.3%.

Source: U.S. Census, 2014 American Community Survey



David Engelthaler

LEADERSHIP: Multi-Sector Collaboration | STEM CITY

Led by Flagstaff 40, STEM City was created by a public-private partnership that includes key business and education leaders, Northern Arizona University, Coconino Community College, the Flagstaff Unified School District, local charter schools and the Flagstaff City Council, which proclaimed Flagstaff as America’s 1st STEM City on August 7, 2012. Science Foundation Arizona and the Arizona Community Foundation provided the funding for a part-time STEM coordinator. The STEM City Center, funded in part by NAU, is located at the Northern Arizona Center for Entrepreneurship and Technology (NACET). Its goal is to increase student interest in STEM degrees. Flagstaff is a community with deep roots in science and technology; employers and educators are aligned.

Center for the Future of Arizona

Arizona is a young state and, until recently, a sparsely populated one. But its rapid growth and success over the last 100 years is the story of disciplined and innovative leaders who emerged at all the right times, willing to come together around big ideas and equally willing to act within their moment in time.

Now is one of those moments.

Ambitious goals, those of citizens and leaders alike, are essential to the future of a successful, modern society. But they cannot be achieved unless we confront the same two realities that challenge every prosperous and healthy place:

- Without **higher levels of civic participation** in all aspects of our political and community life, none of the eight goals identified by the people of Arizona can be achieved.
- Without **higher levels of educational attainment** among students from all walks of life, the economic prosperity that everyone seeks will remain beyond our reach.

The Center's work has been focused on these two challenges for a long time and they are the focus of our organization's 2015-2025 strategic plan.



"Since its inception, the Center has been our state's most credible voice for defining the right pathways to a prosperous future. In this age of opinion and spin, the Center stands out as a beacon of clarity and commitment to the facts. More than any other organization, it has been the source of our community conscience."

*Don Smith
President and CEO
CopperPoint Mutual
Insurance Company*

HERITAGE SQUARE
FLAGSTAFF, ARIZONA

The Arizona We Want

Arizona citizens will actively pursue a common ROADMAP for the future.

Over the last decade, the Center has established partnerships with many state and local Arizona organizations. This was a critical first step in helping Arizonans find a common roadmap for the future. More than 100 organizations are working with the Center in some way or another and many more are affiliated on special projects. One common thread is universal—Arizonans know that things are not working as well as they could be and we need everyone to step up.

CFA COMMITMENTS:

GOAL: Increase the responsiveness of government and other leaders to citizen goals.

Strategies:

1. Provide ready opportunities for broader citizen participation in policy decisions and community building at the local level.
2. Participate in policy discussions, public investment decisions and advocacy opportunities that advance citizen goals.
3. Provide unbiased information on candidate positions and ballot measures impacting citizen goals.
4. Build strong working alliances with existing and new partner organizations committed to empowering Arizona citizens and impacting policy decisions consistent with citizen goals.

GOAL: Develop community-based exchanges that empower individual efforts and create a collective voice for all citizen goals.

Strategies:

1. Create The Arizona We Want Exchange, an open online community to promote existing efforts to achieve citizen goals.
2. Select five to 10 communities to pilot the Exchange and other initiatives to broaden community participation.
3. Give visibility to good ideas and implementation models to help Arizona communities learn from one another.
4. Increase community and organizational participation in the Gallup Arizona Poll to keep a pulse on citizen priorities and shape local dialogue and decision-making.

GOAL: Develop, engage and encourage young talent to stay and be participants in Arizona.

Strategies:

1. Tap the talent and fresh thinking available in young Arizonans and put it to use in the state's high schools and colleges.
2. Embed young professionals statewide in all Center initiatives and activities.
3. Develop an "onboarding" strategy to introduce and link recent college graduates to Arizona opportunities, efforts and avenues for engagement.
4. Build a culture that gives young talent responsibility for helping shape Arizona's future.



"Due to its unique and compelling data on what Arizonans want, the Center is the trusted source in helping to guide this state's long-term planning and investments. Its action agenda provides opportunities for our leaders to connect to each other and the community. We need to pay greater attention to this work."

*Jaime Molera, Partner,
Molera Alvarez Group*

The Education We Need

Arizona's education system ensures EXCELLENCE and EQUITY for every student.

The success of every child is vital to our state's economic prosperity, quality of life and civic health. To deliver on the promise of education, our system must offer both excellence and equity. We must close the achievement gap that leaves so many children behind, increase educational attainment overall and prepare a highly skilled workforce. At the same time, our education system must be adaptive and keep pace with a changing world economy.

CFA COMMITMENTS: :

GOAL: Incubate innovative education solutions to the challenges that confront us in our education system.

Strategies:

1. Challenge current assumptions about education design and delivery.
2. Inspire educators, entrepreneurs, researchers and students to share ideas and develop solutions through networking and collaboration.
3. Pilot and evaluate the best personalized learning practices and tools, and help scale what works.
4. Create a supportive environment in policy and practice for education innovation.

GOAL: Empower student success through personalized college and career pathways.

Strategies:

1. Drive the development and implementation of performance-based personalized approaches to learning.
2. Develop career pathways in partnership with business and education that provide young people with the skills and credentials needed for high-wage, high-demand jobs.
3. Streamline the transition between high school and college for students.
4. Create a network of organizations engaged in pathways work in the state to provide greater awareness, cohesion and cooperation across efforts.

GOAL: Equip school leaders to help all students succeed.

Strategies:

1. Increase the capacity of school leaders to improve student academic achievement by providing training and mentoring grounded in research.
2. Provide school leaders with tools and resources to successfully design, implement and sustain innovative practices.
3. Give visibility to effective learning, data analysis and teaching methods.
4. Engage in public policy discussions that promote the ability of schools to improve student performance and close achievement gaps.



"Helios Education Foundation is proud to partner with the Center for the Future of Arizona. Their leadership on initiatives like Beat the Odds and Move On When Ready has impacted thousands of students throughout the state. They are helping lead Arizona to make educational improvements that will help prepare more students for success in college and career."

*Paul Luna
President and CEO
Helios Education Foundation*

The Future We Envision

Arizona is known for successful multi-sector COLLABORATIONS that move Arizona goals forward.

The Center recognizes that Arizona has major challenges. We also have major opportunities that align closely with citizen goals. They won't be achieved next year or the year after. The goals are too complex and the financial investments too large to be accomplished in a quick sprint.

The Arizona we want can be achieved if we commit to long-term planning, long-term investments and a sustained sense of purpose.

CFA COMMITMENTS:

GOAL: Support collaborative leaders and inspire public policy based on the demographics that define Arizona.

Strategies:

1. Support leaders and emerging leaders with the skills to build collaborations around specific goals and plans that can be successfully executed.
2. Work closely with leadership development groups to provide skill-development opportunities.
3. Advocate for the investment needed to achieve citizen goals.

GOAL: Work closely with partners to achieve the same quality of thought leadership and execution that has served Arizona in the past.

Strategies:

1. Expand partnerships with research organizations, thought leaders and experts to provide the best information available on issues and future trends.
2. Communicate regularly with leaders in all sectors, including Arizona cities and towns.
3. Build strong working alliances with all sectors to embed citizen goals in their action plans.

GOAL: Position Arizona as a national leader in addressing key issues that challenge modern economies and democracies.

Strategies:

1. Identify areas where Arizona leads the nation—water management, access to higher education, access to healthcare—and make the stories part of a new state narrative.
2. Pursue opportunities with national partners to promote Arizona as a dynamic hub for national and international discussions.



“Arizonans and their leaders have rightfully prided themselves as forward thinkers, consistently focused on the future they envision. The evidence is all around us no matter where we live. The Center for the Future of Arizona institutionalizes this ideal and cultural feature of our state, and ensures that the DNA of Arizona’s future focus remains a part of us for decades to come.”

*Steve Seleznow
President and CEO
Arizona Community Foundation*



Action Steps for Arizona

There comes a moment in the life of every state when its basic features—its people, its economy, its education system, its human and physical infrastructure—are such that a concerted, major decade-long effort can bring all of the pieces together in ways that enable the state to emerge as a fully vital and competitive player among the 50 states of the nation. Our work at the Center for the Future of Arizona over the past decade leads us to believe Arizona is poised to take that major step over the coming decade.

What gives us this hope and belief that Arizona can fully come of age by 2025?

1. Arizonans love this place, its beauty and open spaces, its climate, our relatively low cost of living.
2. Two thirds of Arizonans, born elsewhere, have chosen to live here, making it one of the highest “I chose to live here” populations in the country.
3. We have recent examples of significant improvement in key elements of our infrastructure—our university and community college systems as leading examples of innovation, the emergence of a promising bio-science corridor from Tucson to Flagstaff, the ability to establish several K-12 schools that rank among the nation’s best.
4. More importantly, we have established a clear picture of what Arizonans want for their future, and with an equally clear picture of what it’s going to take to accomplish their goals.

VISION 2025: Arizona Comes of Age sets the stage for a decade of action. We, at the Center for the Future of Arizona, believe the time has come to mobilize individuals and organizations throughout Arizona.

What can you do?

As individuals:

- Visit the CFA website and read VISION 2025.
- Take the Gallup Arizona Poll for yourself.
- Look at the Arizona Civic Health Index report and engage with every civic activity you can.
- Encourage organizations you know to get involved by joining The Arizona We Want Exchange, an online community that will promote existing efforts to achieve citizen goals.

As organizations:

- Visit the CFA website and read VISION 2025.
- Encourage employees to take the Gallup Arizona Poll.
- Look at The Arizona We Want action reports online and consider submitting one for your organization.
- Join The Arizona We Want Exchange.
- Embed Vision 2025 in your own strategic planning.
- Contact CFA if you want to become more directly involved as we move forward.

www.arizonafuture.org



AJO TOWN PLAZA
AJO, ARIZONA

Our Partners

NATIONAL PROGRAM PARTNERS

GALLUP

Gallup

A pioneer in the application of behavioral economics to public data analysis, Gallup has been working closely with the Center since they were commissioned to conduct the Gallup Arizona Poll in 2008-09. A new partnership, Gallup Analytics, gives the Center access in real time to all data captured across four other ongoing studies—the Gallup World Poll, the Gallup U.S. Daily Tracking Poll, the Gallup-Healthways Well-Being Index and the Gallup State of the States reports. The Center is committed to making the data available to leaders, citizens and organizations statewide on a regular basis.



National Conference on Citizenship

National Conference on Citizenship (NCoC)

NCoC is chartered by Congress to provide national and state-level findings on the nation's only comprehensive civic health index. It continuously explores what shapes today's citizenry, defines the evolving role of the individual in democracy and uncovers ways to motivate greater participation. The Center has partnered with NCoC for five years to capture data for the Arizona Civic Health Index. The most current data is included in this report. The findings are based on analysis of U.S. Census Current Population Survey (CPS) data performed by the Center for Information & Research on Civic Learning and Engagement (CIRCLE) at Tufts.



The National Center on Education and the Economy (NCEE)

NCEE was created in 1988 to analyze the implications of changes in the international economy for American education, to formulate an agenda based on that analysis and to seek wherever possible how to accomplish the agenda through policy change and development of the resources educators need to carry it out. Since 2009, the Center has partnered with NCEE on the Move On When Ready initiative. This initiative is part of the national Excellence for All effort, and NCEE continues to provide national leadership and technical support.



JOBS FOR THE FUTURE

Jobs for the Future (JFF)

Founded in 1983, JFF works with communities nationwide to design and drive the adoption of education and career pathways leading from college readiness in high school to career advancement for those struggling to succeed in today's economy. In June 2014, Arizona joined the Pathways to Prosperity Network, a multi-state initiative led by JFF and Harvard Graduate School of Education. The goal is to increase the number of young Arizonans who complete high school, attain a postsecondary credential with value in the labor market, and get launched in a high-demand, high-wage occupation that also provides the basis for more education and career advancement. The Center leads the JFF Pathways to Prosperity work in Arizona.



Lumina Foundation

The Lumina Foundation is an independent, private foundation committed to increasing the proportion of Americans with high-quality degrees, certificates and other credentials to 60 percent by 2025. Lumina focuses on helping to design and build an accessible, responsive and accountable higher education system while fostering a national sense of urgency for action. The Center is working with Lumina to shape policies and practices for improving competency-based education as a new model for delivering flexible pathways for students to earn a degree. The Center is also part of a growing coalition of Arizona entities working to encourage state leaders to adopt an attainment goal and implementation plans that are challenging, quantifiable, long-term and address attainment gaps for underrepresented populations through State Strategy Labs supported by Lumina.

FRIENDS

The Center for the Future of Arizona is deeply grateful to the many organizations and individuals below for their generous support.

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- Arizona Board of Regents
- Arizona Community Foundation
- Arizona State Board of Education
- Diane & Bruce Halle Foundation*
- Helios Education Foundation
- Salt River Pima –Maricopa Indian Community
- Apollo/University of Phoenix

Innovator (\$225,000-\$999,000)

- Arizona Governor's Office of Workforce Development
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- Freeport-McMoRan Copper & Gold Foundation
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Leader (\$150,000 - \$224,999)

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- Nina Mason Pulliam Trust
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Champion (\$75,000 - \$149,999)

- Arizona Investment Council
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- National Bank of Arizona
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- Flinn Foundation
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In both practice and theory, citizen goals are at the heart of all we do.

www.arizonafuture.org

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Center for the Future of Arizona

541 East Van Buren, Suite B-5, Phoenix, Arizona 85004 | (602) 496-1360 | www.ArizonaFuture.org

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