

## HELIOS EDUCATION FOUNDATION – FACT SHEET

### About Helios Education Foundation

- Helios Education Foundation is the largest foundation focused exclusively on education serving Arizona and Florida.
- The Foundation’s mission is: To enrich the lives of individuals in Arizona and Florida by creating opportunities for success in postsecondary education.
- Helios Education Foundation was established in 2004 following the sale of Southwest Student Services Corporation, a full-service student loan products and services company with affiliates in Arizona and Florida. The net proceeds from the sale were used to fund Helios Education Foundation’s endowment.

### Helios Education Foundation’s Community Investment

- Since its inception, Helios Education Foundation has invested more than \$62 million in educated-related programs and initiatives.
- Helios is focused on enriching lives in three distinct areas within education:
  - Early Childhood Education – Ensuring children, ages 0-5, are prepared to enter school ready to succeed.
    - Improved Teacher Quality
  - Transition Years (Grades 5 – 12) – Helping youth stay in school, transition successfully between the various stages of education, and graduate academically prepared.
    - Improved Teacher Quality
    - Increased Curriculum Rigor and Student Readiness
    - Ongoing Personal Growth and Character Development
    - Fostering Parent and Community Engagement
  - Postsecondary Scholarships – Providing young adults with the opportunity to attend and the support to succeed in postsecondary education.
    - Increased Financial, Academic and Personal Support

### Helios Education Foundation’s Leadership

- Vince Roig, Chairman of the Board
- Paul J. Luna, President and Chief Executive Officer
- Board - In addition to Mr. Roig and Mr. Luna, the Board includes: Don Aripoli, Vice President Emeritus for Student Affairs and Director of Student Affairs Development at Missouri State University; Mark Fernandez, Senior Vice President & Chief Sales Officer for Tampa Bay Rays; Tom Herndon, retired Executive Director of the Florida State Board of Administration; Dr. Ioanna Morfessis of IO.INC, Jane Roig, President Tri-R Consulting, and Barbara Ralston, President and CEO of Women’s Fresh Start Women’s Foundation.
- Management - Barbara Ryan, Executive Vice President and Chief Operating Officer; Michael Chesin, Senior Vice President and Chief Financial Officer; Ian Smith, Senior Vice President and Chief Communications Officer; Karen Ortiz, Vice President and Director of Early Childhood Education; Stacy Carlson, Vice President and Director of Transition Years – Florida; Linda Thompson, Vice President and Director of Grants Administration; Jo Anne Vasquez, Vice President and Director of Transition Years – Arizona, Teacher & Curriculum Initiatives; Antonia Franco, Vice President and Director of Transition Years – Arizona, Student, Parent & Community Initiatives and Tammi Crum, Executive Assistant to the President and CEO.