



# What if...

you truly  
changed lives?



# What if...

we start today?

**Impact Report**  
2021 - 2022



Junior  
Achievement™  
of Kentuckiana



# JA Student Journey

Our experiential programs and learning experiences foster the confidence, knowledge and determination for youth to thrive—building a better future for themselves and their community.

## INSPIRE

Introductory learning experiences that develop an interest.

## PREPARE

Core learning experiences that build skills, behaviors, and ultimately competencies.

## SUCCEED

Authentic engagement programs encourage students to think critically about their future. Giving students real life scenarios and experiences.



## JA IS ESSENTIAL

The impact of the COVID-19 pandemic went beyond the disruptions students experienced during the 2020-21 school year.

Junior Achievement’s goal is to promote competencies around work and career readiness, financial literacy, and entrepreneurship amongst students. Our delivery model which combines caring volunteers with proven programs, has been shown to promote self-belief and a sense of purpose in students.

# Dear Friends,

The 2021-2022 school year continued to be a year of growth and resilience. From the ongoing setbacks of the pandemic, an unprecedented number of families facing financial challenges, to our students confronting significant obstacles, we continued to meet the needs of students and educators. With a year that held so many uncertainties, we also believe it held hope.

Throughout the year, our team and Board of Directors remained committed to ensuring students received programming focused on our three pillars: financial literacy, work readiness and entrepreneurship.

We are excited to share that this past school year, JA reached over 33,000 students! Through a combination of JA BizTown, JA Finance Park, JA Inspire, and our JA classroom learning experiences, students are once again able to receive the impactful programming we offer. The reopening of our Junior Achievement Center along with JA volunteers returning to the classroom marked a return to what we do best... educating kids!

Through all of our programs, students are learning more about personal financial planning and career exploration, as they connect the dots between what they learn in school and how it applies in the workplace.

As you review this update, we hope you consider investing in our future consumers, employers, and employees. We need our future leaders to ensure a sustainable economy and community. It is more important now than ever, to ensure young people have the skillset and mindset to build thriving communities. Consider volunteering or making a gift to JA today to make a difference!

With gratitude,



**Chris Brooker**  
Board Chair



**Jennifer Helgeson**  
President



**Junior Achievement™**  
of Kentuckiana

James W. Robinson Junior Achievement Center  
for Freedom of Enterprise  
1401 W. Muhammad Ali Blvd.  
Louisville, KY 40203

www.JAKY.org | 502-561-KIDS



Junior Achievement supports students in public, parochial, and private schools in the following 26 counties throughout Kentucky and Indiana:



**JA Mission:** To inspire and prepare young people to succeed in a global economy.

# JA Experiential Programs



**JA BizTown®**



**JA Finance Park®**

Kids and JA Alumni say **JA BizTown** is “the best field trip ever”, a city made for kids and ran by kids to help them understand the free enterprise system. At **JA Finance Park**, students will walk in adults’ shoes as they buy a home, purchase a car, plan their entertainment, and balance their monthly budget. Since the James W. Robinson Center for Freedom of Enterprise opened in 2001, more than 360,941 students have experienced the 16-hour classroom curriculum followed by the real-life simulations.



**JA Inspire**

JA of Kentuckiana’s locally developed JA Inspire career exploration curriculum and interactive career exploration event continues to introduce students to a variety of regional career opportunities. In October 2022, JA is excited to launch the LIVE version of JA Inspire after several years of being virtual due to COVID. We will host over 11,000 students who will learn from more than 300 adult mentors in 90 career stations that represent Manufacturing, Engineering, STEM, Skilled Trades, Business and Information Technology, Health Services, Education, Law, Human Services, Communications, Arts, and Hospitality.



**3DE™**  
BY JUNIOR ACHIEVEMENT

3DE powered by Junior Achievement, unlocks academic potential, and expands economic opportunity for all students. Rooted in competency-based case methodology, 3DE re-engineers high school education to break through traditional barriers and redesign the framework of education from the inside out. Students at Valley High School and The Academy at Shawnee experienced case challenges led by some of Kentuckiana’s most prominent companies: Deloitte, Norton Healthcare, Trilogy, GE Appliances, and Amgen. Along with non-profit partners, Rotary Club of Louisville and Kentucky NAACP, who joined forces to design and deliver a unique and dynamic case. 3DE students gain the competencies they need to be prepared for their future job or career which include: collaboration, critical/analytical thinking, cultural agility, communication, creativity/innovation, and self-direction.

# IMPACT

2020-2021

**24,045**  
Students



**790**  
Classes



**133**  
Schools & After-  
School Sites



**170,361**  
Instructional Hours



# JUNIOR ACHIEVEMENT VOLUNTEER RECEIVES TOP NATIONAL HONOR

Junior Achievement of Kentuckiana (JA) is pleased to announce that one of Kentuckiana's business leaders has won the Junior Achievement Gold Leadership Award, Ms. Ann Leonard.

Junior Achievement's Gold Leadership Award honors volunteer excellence. The award recognizes leadership in supporting and expanding JA's student impact, resources, operational excellence, and sustainability.

"Our local business community's support of JA is critical to achieving our mission, to inspire and prepare young people to succeed in the global economy," said Jennifer Helgeson, President of Junior Achievement of Kentuckiana. "Ann Leonard, Chief Financial Officer at DDW, the Color House, is a remarkable example of the dedication and service to others. In a very real

way, she makes sure our region's JA students attain the knowledge and skills they need to own their economic success, plan for their future, and make smart academic and economic choices."

During her tenure as Board Chair, Ann led the Board to seek a role in the 3DE pilot, which involved securing \$1 million in additional funding. Her entrepreneurial spirit and unwavering support and encouragement of staff empowered the team secure the opportunity and funding needed. 3DE Schools by Junior Achievement re-engineers high school education to be more relevant, experiential, and authentically connected to the complexities of the real world in order to prepare today's students for the demands of tomorrow's economy.

The program brings real-world problem-solving representing



real workplace challenges into the everyday academic experience. Results from the 3DE Atlanta, Georgia pilot prove that 3DE increases student engagement, strengthens comprehension, builds critical thinking, and accelerates academic performance. Ann also serves as a local JA board member, a volunteer position she has held since 2010.

Volunteer today by contacting Jennifer Harris at [jharris@jaky.org](mailto:jharris@jaky.org)

## JA LAUNCHES UPDATED LOGO AND BRANDING

We are excited to announce the launch of the new Junior Achievement logo and brand. It's the first change to the Junior Achievement logo since 1986. The update reflects the organization's evolution from a supplemental youth development program in the 1980s to a fully integrated K-12 education partner today. JA helps students connect what they learn in school to life outside the classroom, especially when it comes to managing money, work and career readiness, and entrepreneurship.

Since 1986, the Junior Achievement logo has consisted of a green triangle with three white or gold stairsteps in the triangle. The new logo, which resembles planes flying in formation or a flock of geese, borrows elements from the five

previous JA logos. The new logo and branding, which utilizes dark blue, turquoise, yellow, and green color elements, represents how one leader in the community, working in tandem with Junior Achievement, can impact many lives. Ultimately, by working together, we can all rise above. Junior Achievement envisions "a world where young people have the skillset and mindset to build thriving communities."



# BOARD OF DIRECTORS

as of June 5, 2022

## **Officers:**

Chair:

**Mr. Christopher W. Brooker**  
*Wyatt Tarrant & Combs, LLP*

Vice Chair:

**Mr. Todd A. Spencer**  
*Doe-Anderson, Inc.*

Treasurer:

**Mr. Patrick R. Farnan**  
*U.S. Bancorp*

Assistant Treasurer:

**Mr. Will Rives**  
*Heaven Hill Distilleries, Inc.*

Secretary:

**Ms. Stephanie Mooney**  
*United Parcel Service, Inc.*

Immediate Past Chair:

**Ms. Ann Leonard**  
*DDW, The Color House*

## **Board Members**

**Mr. Justin Alexander**  
*PwC*

**Dr. Sharon Allen**  
*Indiana University Southeast*

**Ms. Julayne Amstutz**  
*First Harrison Bank*

**Mr. Duffy Baker**  
*JPMorgan Chase & Co.*

**Mr. Frank O. Barlow**  
*Merrill Lynch*

**Mr. Cleo Battle**  
*Louisville Tourism*

**Mr. Matthew Beebe**

**Mr. Martin L. Bell**

**Mr. M. Joseph Bisig IV**  
*PNC Bank*

**Ms. Randisha Carter**  
*American Synthetic Rubber  
Corporation LLC*

**Ms. Nikki Carver**  
*JPMorgan Chase & Co.*

**Mr. Marc B. Charnas**  
*GE Appliances*

**Mr. Jordan Clemons**  
*Greater Louisville Inc.*

**Mr. Herbert Crook**  
*Coca-Cola Bottling Co. Consolidated*

**Ms. Nancy B. Davis**

**Ms. Leah A. Eggers**  
*On Plane Consulting*

**Mr. Kenneth Faith, II**  
*Algood Food Company*

**Mr. Benjamin C. Fultz**  
*Fultz Maddox Dickens P L C*

**Mr. Paul Fultz**  
*KPMG LLP*

**Mr. Clinton L. Glasscock**  
*McGriff Insurance*

**Mr. Thomas C. Gleason**  
*Frost Brown Todd LLC*

**Mr. Ankur Gopal**  
*Interapt*

**Mr. Donald L. Gossman**

**Mr. Kenneth Groth**  
*Ken Groth Performance Consulting*

**Mr. Taylor Hamilton**  
*Morgan Pottinger McGarvey*

**Mr. Brian Hart**  
*Delta Dental of Kentucky*

**Mr. Dennis P. Heishman**  
*Old National Bancorp*

**Mr. Doug Helm**  
*MCM CPA & Advisors*

**Ms. Jessica L. Holleran**  
*Yum! Brands Inc.*

**Mr. Demetrius O. Holloway**  
*Stites & Harbison*

**Mr. James M. Horlander**  
*Ingenium Talent*

**Mr. Taylor Jolly**  
*Mercer*

**Mr. Kevin J. Joynt**  
*Deloitte & Touche LLP*

**Ms. Elizabeth Kaplan**  
*Baird*

**Mr. Danail Kelisakiev**  
*Brown-Forman Corporation*

**Ms. Sharon Kerrick**  
*University of Louisville*

**Ms. Amanda Kramer**  
*Texas Roadhouse, Inc.*

**Mr. John Lawson**

**Mr. Christopher Manzo**  
*Sndbx Design + Architecture Studio*

**Mr. Jim Meyers**  
*Norton Healthcare*

**Ms. Kim Morales**  
*JCPS Gheens Institute for Innovation*

**Mr. Conner Parsons**  
*Pluris Real Estate*

**Mr. Raja Patil**  
*Dentons Bingham Greenebaum LLP*

**Mr. Michael Rehm**  
*Stock Yards Bank & Trust Company*

**Mr. Chris Reid**  
*Ernst & Young LLP*

**Ms. Meaghan Reynolds**  
*Strothman and Company*

**Ms. Christy C. Rogers**  
*MTX Group*

**Mr. Dale Shinkle**  
*PharMerica Corporation*

**Mr. Ryan Sienkowski**  
*Caesars Southern Indiana*

**Mr. Adam Simon**  
*Right Path Financial*

**Mr. David Sinclair**  
*LG&E and KU Energy LLC*

**Mr. Dale Skaggs**  
*Blue & Co., LLC*

**Mr. Todd Spurgeon**  
*Kightlinger & Gray*

**Ms. Rachel Spurlock**  
*Crowe LLP*

**Mr. Alexander Staffieri**  
*Stoll Keenon & Ogden PLLC*

**Ms. Susan Staples**  
*Waystar*

**Mr. William E. Summers V**  
*Republic Bank & Trust Company*

**Mr. John C. Taft**  
*Advantum Health*

**Mr. James M. Thompson**  
*Autotruck Financial Credit Union*

**Mr. Taylor M. Thompson**  
*PRG Commercial Property Advisors*

**Ms. Krista Ward**  
*Kindred Healthcare, Inc.*

**Mr. Kyle Warden**  
*Fifth Third Bancorp*

**Mr. Jim Watkins**  
*Limestone Bank*

**Ms. Genny Wentz**  
*Independence Bank*

**Mr. Landon White**  
*Enterprise Holdings, Inc.*

**Ms. Jennifer Williams**  
*FORVIS*

**Mr. John Wurtenberger**  
*Dean Dorton*

# STATEMENT OF ACTIVITIES

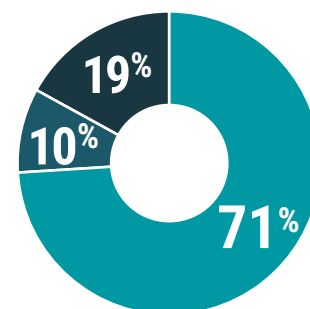
Year Ending June 30, 2021

Public Support and Revenues:	Without Donor Restrictions	With Donor Restrictions	Total
Contributions, sponsorships and grants	\$ 983,377	\$ 69,500	\$ 1,052,877
Special events, net of cost of benefit to donors	\$ 170,262		\$ 170,262
Investment Income	\$ 46,752		\$ 46,752
Unrealized gain on investments	\$ 457,459		\$ 457,459
Realized gain on investments	\$ 66,194		\$ 66,194
In-kind contributions	\$ 239,391		\$ 239,391
Other Income	\$ 420,851		\$ 214,102
Change in beneficial interests in assets held by others	\$ 74,308		\$ 74,308
Net assets released from restriction:			
Purpose restrictions	\$ 39,506	\$ (39,506)	
Time restrictions	\$ 20,550	\$ (20,550)	
<b>Total Public Support and Revenues</b>	<b>\$ 2,311,901</b>	<b>\$ (60,056)</b>	<b>\$ 2,321,345</b>
<b>Expenses:</b>			
Program expense	\$ 1,283,125		\$ 1,283,125
Management and general expense	\$ 171,877		\$ 171,877
Fundraising and special events expense	\$ 344,603		\$ 344,603
Loss on disposal of fixed assets	\$ 280.00		\$ 280.00
<b>Total Expenses</b>	<b>\$ 1,799,885</b>		<b>\$ 1,799,885</b>
<b>Change in Net Assets</b>	<b>\$ 512,016</b>	<b>\$ 9,444</b>	<b>\$ 521,460</b>
<b>Net Assets, Beginning of Year</b>	<b>\$ 4,149,355</b>	<b>\$ 25,056</b>	<b>\$ 4,174,411</b>
<b>Net Assets, End of Year</b>	<b>\$ 4,661,371</b>	<b>\$ 34,500</b>	<b>\$ 4,695,871</b>

## EXPENSE ALLOCATION

Year Ending June 30, 2021

- Program Services
- Management & General
- Fundraising & Special Events



# THREE PILLARS OF SUCCESS

### Financial Literacy

It has never been more important to deliver financial literacy for students. Our proven approach helps students in Kentuckiana develop an understanding of earning, saving, and budgeting.

### Entrepreneurship

JA Alumni are more likely to start businesses that create jobs. Our entrepreneurship programs help students learn how to operate a business and think critically, solve problems and overcome challenges.

### Career Readiness

Real workforce preparation from working professionals is our model. Our career readiness standards help today's students become tomorrow's productive employees.