



**Junior  
Achievement™**  
of Kentuckiana

**BOUNDESS  
POSSIBILITY™**



**IMPACT REPORT  
2022-2023**



# Dear Friends,

Each day at Junior Achievement of Kentuckiana, our team and Board of Directors work to help young people discover what's possible in their lives through programming focused on financial literacy, work readiness, and entrepreneurship.

We do this by helping them connect what they learn in school with life outside the classroom. We let them know it's possible to invest in their future, to gain a better understanding of how the world works, and to pursue their dreams. We show them that it's possible for tomorrow to be a better day.

This approach is more important than ever. Today's young people face challenges that didn't exist just a few years ago.

At JA, we don't just teach financial literacy, work and career readiness, and entrepreneurship. We promote hope. Our volunteers serve as positive role models and mentors for young people who might otherwise be disconnected. Our programs are shown to engage students on a social and emotional level with critical life skills that establish a firm foundation for them to achieve their potential as adults. We are proud to share that JA will serve 50,000 students this year, but we cannot do this work alone.

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 you 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,



**Todd Spencer**  
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 PROGRAMS PROVEN SUCCESS

Global research firm Ipsos recently completed a new survey of Junior Achievement Alumni, reporting that just under one in five Americans have participated in JA programming at some point during kindergarten through twelfth grade.

As part of their experience, more than three-in-four (76%) JA Alumni report that a volunteer from JA came to visit their class, after-school program, or another setting to teach them about money, jobs, or business. Among those who report that a volunteer came to their class, nearly two-thirds (64%) say they remember the concepts the volunteer taught them about money, jobs, or business. More than half (56%) say they are currently in a career or job, or have worked in a similar position, to the one their JA volunteer had.

Just like our JA Alumna Abigayle, we are seeing positive effects of JA programs every day. At the 2023 Kentuckiana Business Hall of Fame, Abigayle shared that she learned about communication in fifth grade while she was interviewing for her job at JA BizTown with her classmates. Once she became the television anchor, she knew that this was the career for her. She continued to take opportunities through the remainder of her middle and high school days around communications, working the JA Inspire radio booth and being a radio personality for her local high school radio station. Abigayle is now visiting colleges to pursue her TV Personality dreams.



## WAYS TO GET INVOLVED:

### Volunteer

Join us as we continue to grow and reach more students in our community. Your time is your most valuable gift. Sign up today at <https://jaky.org/in-person-volunteer/>.

### Financial Support

No gift is too small! Please consider making a gift today to sponsor a student's experience with financial literacy, work-readiness training, and entrepreneurship programming. Donate today at [www.jaky.org/donate](http://www.jaky.org/donate).

### Join Us for a JA Event

We invite you or your company to participate in our Annual Golf Scramble, TopGolf, Kentuckiana Business Hall of Fame, or one of our many Bowl-a-Thons. Visit [www.jaky.org/events](http://www.jaky.org/events) to learn about all the different events we host to benefit JA.



# IMPACT

2021-2022

**404,045** Instructional  
Hours



**33,255** Students  
Served



**1,004** Volunteers



**166** Schools and  
After-School Sites



# EXPERIENTIAL LEARNING



JA Inspire, JA of Kentuckiana's mega career fair, was back in-person with 12,000 students at the Kentucky Expo Center in October of 2022. This locally developed program allows students to gain an idea of what they want to do after high school. Which in return, studies show that students are much more likely to take relevant courses, stay in school, and graduate. That is why we collaborate with our local schools and over 50 businesses with 200+ representatives to INSPIRE students in our community!



JA BizTown and JA Finance Park combine in-class learning with a day-long visit to the James W. Robinson Center for Freedom of Enterprise. While visiting JA BizTown and JA Finance Park, students can connect the dots between what they learn in school and the real world. At JA BizTown students visit a simulated town where they learn to operate businesses and municipalities, vote for a mayor, create the news, all while writing checks, and creating a personal budget. At JA Finance Park students participate in a budgeting simulation where they will be given a monthly income and job persona. They will then work to create a monthly budget by researching transportation, food options, insurance, entertainment, and those unexpected expenses.



3DE Powered by Junior Achievement is rooted in competency-based case methodology, re-engineering high school education to break through traditional barriers and redesign the framework of education from the inside out. This year students at Valley High School and the Academy at Shawnee experience case challenges led by some of Kentuckiana's most prominent companies: Deloitte, Norton Healthcare, Trilogy, GE Appliances Delta Dental of Kentucky, AIA of Kentucky, and Amgen. Along with the Rotary Club of Louisville and the NAACP. We are excited to launch our newest program in Fall of 2023 at Jeffersontown High School.



# BOARD OF DIRECTORS

as of February 1, 2023

## **Officers:**

---

Board Chair:

**Todd A. Spencer**

*Doe-Anderson*

Vice Chair:

**Stephanie Mooney**

*UPS Airlines*

Treasurer:

**Will Rives**

*Heaven Hill Brands*

Assistant Treasurer:

**Patrick Farnan**

*U.S. Bancorp*

Secretary:

**Christopher Manzo**

*Sndbx Design + Architecture Studio*

## **Members of the Board**

---

**Mr. Justin Alexander**

*PwC*

**Dr. Sharon Allen**

*Indiana University Southeast*

**Julayne Ricketts Amstutz**

*First Harrison Bank*

**Frank Barlow**

*Merrill Lynch*

**Cleo Battle**

*Louisville Tourism*

**Jon Baughman**

*Stock Yards Bank & Trust*

**Martin L. Bell**

*Lifetime Member*

**M. Joseph Bisig IV**

*PNC Wealth Management*

**Christopher W. Brooker**

*Wyatt, Tarrant & Combs LLP*

**Randisha Carter**

*American Synthetic Rubber Corporation*

**Nikki Carver**

*JPMorgan Chase & Co.*

**Marc B. Charnas**

*GE Appliances, a Haier company*

**Herbert Crook**

*Coca-Cola Bottling Co. Consolidated*

**Nancy B. Davis**

*Lifetime Member*

**Kenneth W. Faith II**

*Algood Food Company*

**Benjamin C. Fultz**

*Fultz Maddox Dickens Attorneys*

**Paul G. Fultz**

*KPMG LLP*

**Clinton L. Glasscock**

*McGriff Insurance*

**Thomas C. Gleason**

*Frost Brown Todd LLC*

**Ankur N. Gopal**

*Interapt*

**Donald L. Gossman**

*Lifetime Member*

**Taylor M. Hamilton**

*Morgan Pottinger McGarvey*

**Charles Harris**

*Bank of America Corporation*

**Brian Hart**

*Delta Dental of Kentucky*

**Dennis Heishman**

*Old National Bancorp*

**J. Douglas Helm**

*MCM CPAs & Advisors*

**Jessica Holleran**

*Yum! Brands, Inc.*

**Demetrius O. Holloway**

*Stites & Harbison*

**Jamie Horlander**

*Ingenium Talent*

**Taylor Jolly**

*Mercer*

**Kevin J. Joynt**

*Deloitte LLP*

**Elizabeth Kaplan**

*Baird*

**Dr. Sharon Kerrick**

*University of Louisville*

**Amanda Kramer**

*Texas Roadhouse, Inc.*

**John P. Lawson**

*First Savings Bank*

**Ann Leonard**

*DDW, The Color House*

**Michael McGee**

*Dentons*

**Jim Meyers**

*Norton Healthcare*

**Kim Morales**

*Jefferson County Public School*

**Justin Morris**

*Humana*

**Chris J. Reid**

*EY*

**Meaghan Reynolds**

*Strothman+Co*

**Taylor Scarlett**

*Harding, Shymanski & Company, P.S.C.*

**Dale Shinkle**

*3rd Turn Brewing*

**Ryan Sienkowski**

*Caesars Southern Indiana*

**Adam Simon**

*Right Path Financial, LLC*

**David S. Sinclair**

*LG&E and KU Energy LLC*

**Dale B. Skaggs**

*Blue & Co., LLC*

**J. Todd Spurgeon**

*Kightlinger & Gray*

**Rachel Spurlock**

*Crowe LLP*

**Alexander G. Staffieri**

*Stoll Keenon Ogden PLLC*

**Susan Staples**

*Waystar*

**William Summers V**

*Republic Bank*

**John Taft**

*Advantum Health*

**Jim Thompson**

*Autotruck Financial Credit Union*

**Taylor Thompson**

*PRG Commercial Property Advisors*

**Krista Ward**

*ScionHealth*

**Genny Wenta**

*Independence Bank*

**Landon White**

*Enterprise Holdings*

**Jennifer L. Williams**

*FORVIS*

**John Wurtenberger**

*Dean Dorton*

# Statement of Activities

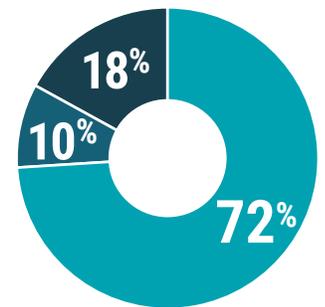
Year Ending June 30, 2022

Public Support and Revenues:	Without Donor Restrictions	With Donor Restrictions	Total
Contributions, sponsorships and grants	\$ 1,466,068	\$ 84,300	\$ 1,550,368
Special events, net of cost of benefit to donors	\$ 231,109		\$ 231,109
Government Support	\$ 37,520		\$ 37,520
Investment Income	\$ 86,284		\$ 86,284
Unrealized gain on investments	\$ (647,256)		\$ (647,256)
Realized gain on investments	\$ 117,161		\$ 117,161
In-kind contributions	\$ 248,264		\$ 248,264
Other Income	\$ 275,368		\$ 275,368
Change in beneficial interests in assets held by others	\$ (48,070)		\$ (48,070)
Net assets released from restriction:			
Purpose restrictions	\$ 38,750	\$ (38,750)	
Time restrictions	\$ 34,500	\$ (34,500)	
<b>Total Public Support and Revenues</b>	<b>\$ 1,839,698</b>	<b>\$ 11,050</b>	<b>\$ 1,850,748</b>
<b>Expenses:</b>			
Program expense	\$ 1,350,906		\$ 1,350,906
Management and general expense	\$ 195,051		\$ 195,051
Fundraising and special events expense	\$ 333,471		\$ 333,471
Loss on disposal of fixed assets	\$		\$ 280.00
<b>Total Expenses</b>	<b>\$ 1,879,428</b>		<b>\$ 1,879,428</b>
<b>Change in Net Assets</b>	<b>\$ (39,730)</b>	<b>\$ 11,050</b>	<b>\$ (28,680)</b>
<b>Net Assets, Beginning of Year</b>	<b>\$ 4,661,371</b>	<b>\$ 34,500</b>	<b>\$ 4,695,871</b>
<b>Net Assets, End of Year</b>	<b>\$ 4,621,641</b>	<b>\$ 45,550</b>	<b>\$ 4,667,191</b>

## Expense Allocation

Year Ending  
June 30, 2022

- 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.



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

www.JAKY.org  
502-561-KIDS