

2023



Junior
Achievement™
of OKI Partners

IMPACT REPORT



2023 RECIPIENT

Junior Achievement of OKI Partners has been awarded one of Junior Achievement USA's highest honors: **The 5 STAR Award**. The award is given to local JA offices that have reached outstanding success in financial health, program quality and management.

LETTER FROM JA LEADERSHIP

Dear Friend of Junior Achievement:

JA's mission is to create "a world in which young people have the skill set and mindset to build thriving communities".

Being able to deliver on that mission is quite the accomplishment. Through the programs outlined in this 2022-23 Impact Report and our plans for the upcoming year, you'll see how Junior Achievement of OKI Partners (JA OKI) is delivering on that mission.

This past year, JA OKI provided programs in career readiness, financial literacy and entrepreneurship to 46,408 students in Southwestern Ohio, Northern Kentucky and Eastern Indiana. That's a 12% increase over the prior school year!

Some of our programming highlights include:

- our second (and bigger) Stock Market Challenge, where students learned about and then competed in a mock trading event,
- A Friends of JA Night – a stock market challenge for adults,
- the role out of JA's program designed to deliver Ohio's Financial Literacy curriculum to high school students.

Thanks to an increase in corporate giving, successful special events and continued strong foundation support, JA OKI finished the year in solid financial condition, allowing growth to continue.

We're especially proud to share with you that JA OKI is once again a Five Star Area. This marks the second year in a row for this benchmark of financial and program standards that showcases the excellent work of the board and volunteers.

To the JA volunteers, educators, donors and partners who stepped up for our students this year, thank you. Your support means so much as we continue to grow our JA community.

Sincerely,



Bob

Bob Guido
Chair, OKI Partners Board
of Directors
Partner at PwC



Jeff

Jeff Taylor
President & CEO
Junior Achievement of OKI
Partners

COMMUNITY PARTNERSHIPS

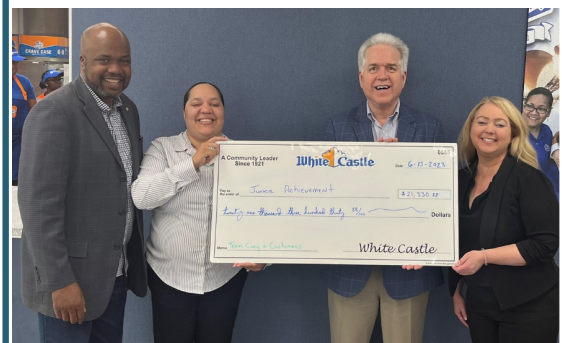
JA OKI, in partnership with **Delta Air Lines** recently presented 5 students from local area high schools full scholarships to the National Flight Academy's summer camp in Pensacola, FL. Congratulations to the all of the winners representing Ignite Institute (N.KY.), Oylar School (CPS), and Winton Woods High School! Special thanks to our Community Partner, Delta Air Lines!



From left to right: Michael Allison, Principal of Oylar School, Reina and Alejandra Martinez, NFA Scholarship recipients, Nick Kuster, Enrichment Site Coordinator, and Jeff Taylor, President and CEO of JA OKI.

JA OKI is excited to continue our strategic partnership with **Procter & Gamble** through the 2022-23 school year. Over 30 volunteers from P&G were trained to teach financial literacy courses to 570 Cincinnati Public School students. The students benefitted not only from the lessons delivered, but from the volunteer's life experiences which positively impacted students while expanding their life skills. These efforts were supported by a grant from the P&G Fund of the Greater Cincinnati Foundation.

Local **White Castle** stores started a campaign in the summer of 2022 to ask customers to support Junior Achievement by donating their change. To date, White Castle has donated more than \$50,000 to JA OKI! Thank you White Castle!



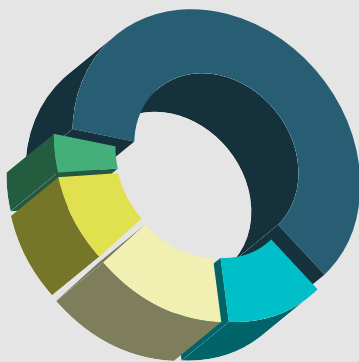
From left to right: Tommy Loveberry, White Castle Regional Director and JA Board Member, Lisa Moore, White Castle District Supervisor, Jeff Taylor, President and CEO of JA OKI, and Chasity Bothman, Director of Corporate Partnerships at JA OKI.

FINANCIALS

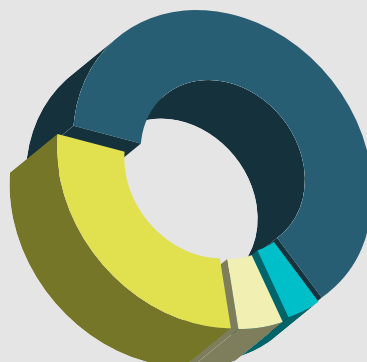
Fiscal Year | July 1, 2022 - June 30, 2023

Revenue: \$1,721,895

Expenses: \$1,609,140



CORPORATE	\$248,797
INDIVIDUAL	\$159,373
FOUNDATION	\$76,743
EVENT	\$1,040,943
OTHER	\$196,039



PROGRAM	\$1,011,007
ADMINISTRATIVE	\$60,860
FUNDRAISING	\$73,597
EVENT	\$463,676

JA OKI BY THE NUMBERS



46,408
students reached



1,163
classes taught



142,868
contact hours



163
schools

FRIENDS OF JA NIGHT



The evening prior to the student's Stock Market Challenge, sponsors of the program were invited to try their hand at investing "one million dollars". Our winning team was CFA Society of Cincinnati.

Pictured, from left to right: Mike Keating, representing the Buenger Foundation, Eric Pettway, Ted Parchman, Chauncey Joyce, Keith Rennekamp from CFA Society, and Rick Wirthlin, event emcee and JA board member.

JA OKI PROGRAM HIGHLIGHTS

JA Inspire to Hire

In March of 2023, more than 4,500 high school and middle school students in Northern Kentucky, Cincinnati and Dayton took part in **JA Inspire to Hire**, a career expo that helps young people learn about potential future careers. Once there, they were greeted by more than 70 companies from our regions. Students used classroom curriculum to better prepare them for the event. These materials included activities designed to help students research careers, manage their personal brand, prepare resumes and discover careers they may have never considered. Thank you to our Presenting Sponsor, the **Carol Ann & Ralph V. Haile, Jr. Foundation**.



JA Stock Market Challenge

In May of 2023, 300+ students participated in **JA Take Stock In Your Future** and **JA Stock Market Challenge**. In their classrooms, students receive a four part curriculum designed to build a foundation understanding of the stock market. Using \$1,000,000 of play money, the students come together to compete by trading stocks over a simulated span of 60 days with new information constantly provided. In this frenetic environment, students track the impact of their decisions and attempt to maximize the value of their portfolio. Students learn how the equities market represents a means by which they can grow wealth. Thank you to our Presenting Sponsor, the **Clement And Ann Buenger Foundation**.

JA continues partnership with the UC School of Education

This past school year, 60 Junior level aspiring educators at UC were paired-up to provide JA programs to 30 fourth and fifth grade classrooms in Greater Cincinnati schools. The entire concept starts with community volunteers providing financial literacy education to the college juniors. All of the participating UC students go through the JA Personal Finance 2.0 course. This course instruction is provided by our volunteer partners at **US Bank**. The goal is to make sure that the college students understand the basic and foundational financial literacy concepts that they then teach to elementary age students.



Elementary Career Event in Germantown, OH

Students and teachers at Valley View Primary and Valley View Intermediate schools learned that it is never too early to begin planning for one's future! Approximately 1,000 K- 6th grade students were treated to preparation materials created by JA OKI prior to the event. This was followed by a Career Fair that rivaled those typically intended for high school students, while covering elementary grade state standards. Among the sixteen career exhibitors were five, local JA board members and their organizations from two of our OKI boards, Dayton and Butler/Warren.

High School Heroes

Local School districts are beginning to embrace the concept of training their high school students to help teach their own elementary students about career readiness, financial literacy, and entrepreneurship while sharpening their own presentation skills and subject knowledge at the same time. Mason High School and Goshen High School are examples of local districts who have invited JA OKI to train and coach their high school students, many of whom are aspiring teachers, health care workers, and business people. This past year over 1,000 students benefited from this program and that number is expected to triple in the 2023/2024 school year.

Innovation Generation (I-Gen)

Timeline: School year 2023-24

Looking Ahead: JA OKI partners with Cincinnati Museum Center for I-Gen

For school year 2023-24, Junior Achievement and the Cincinnati Museum Center are teaming up to help local educators teach students what it takes to be an aspiring entrepreneur. I-Gen students will learn about opportunity identification, innovation, value creation, and problem solving. Students will design their own innovations and have an opportunity to present their ideas to an impartial audience for constructive critique. 20 classrooms (500 students) from throughout the region will participate.

TESTIMONIALS

Junior Achievement has helped me realize the importance of money management and has given me many resources to make financially smart choices. Having these skills will be valuable as I head off to college in the fall. JA prepared me for what is to come over the next several years and has helped me realize that getting ahead now will only help with my financial stability in the future.



Carly McCashland, Union County High School, 2023 scholarship recipient

The children loved the program and learned a lot about how a community works. We LOVED our volunteer, Deatria Walker from State Farm, and she was very engaged with the children.

Nicole Roberts, Teacher at Hyde Park School



Junior Achievement is investing financial education in our youth early and setting them up for financial success in the future. I'm so privileged to be teaching JA More than Money, and I hope that one of the students goes on to become an entrepreneur and start their own successful business.



BJ Herald, Heartland Bank, At the Buenger Boys & Girls Club in Newport, KY

I just love doing this and the kids were great!

Melissa Buell, volunteer from First Bank Richmond



JA OKI SPECIAL EVENTS HIGHLIGHTS



BUSINESS HALL OF FAME



The **2022 Greater Cincinnati Business Hall of Fame** was held on October 6, 2022 at the Cintas Center and raised over \$207,000. Thank you to our Title Sponsor, **Delta Air Lines**.

Recognized in this year's class were:

- **David Foxx** – d.e. Foxx & Associates
- **Phillip O. Geier, Jr.** – Cincinnati Milacron (posthumous)
- **David J. Joseph** – The David J. Joseph Company (posthumous)
- **Mary Miller** – JANCOA Janitorial
- **Bob Morgan** – The Cincinnati Insurance Companies



The **Eastern Indiana Business Hall of Fame** was held on March 9, 2023 at Forest Hills Country Club. The 2023 inductees were:

- **Kevin Ahaus & Jeff Sheridan** of Ahaus Tool & Engineering, Inc.
- **Tom Cox** of Midtown Prescriptions
- **Jim & Brenda McLane** of Western Wayne News.

A big thanks to the Title Sponsors of this year's Business Hall of Fame, **Ahaus Tool and Engineering, Inc. and Recycling Center, Inc.** The event raised over \$52,000.



The **Greater Butler & Warren County Hall of Fame** was held on April 13, 2023 at the Champion Mill Conference Center and raised over \$50,000 for JA programs as we celebrated the induction of these four laureates:

- **Don Crain** of Frost Brown Todd Attorneys
- **Jim Kleingers** of The Kleingers Group
- **Herman R. Sanders** of Butler County Lumber
- **Jill Wilson** of Otterbein SeniorLife



GOLF



The **JA Golf Classic for Cincinnati and Northern Kentucky** events were held at Stonelick Hills on August 2nd and TPC River's Bend on August 22nd and raised over \$315,000 for local youth.

The **Eastern Indiana** region held its 16th golf outing on September 2, 2022 at the Liberty Country Club, raising almost \$30,000. A big thank you to the Event Sponsors – **3Rivers, B&F Plastics, Dot Foods, Personal Touch Cleaning Service, Inc., Quigg Fund, Reid Health, Shook Construction, and Whitewater Valley REMC.**



The **Dayton, Butler & Warren Counties Golf Classic** on June 19 was held at Country Club of the North where it went over goal, raising more than \$39,000. Thank you to our Presenting Sponsor, **Meijer**.



SPORTING CLAYS

Butler & Warren Counties Ladies Sporting Clays Classic was held on May 12, 2023 at Middletown Sportsmen's Club and raised over \$21,000. Thank you to all of our sponsors for supporting this event, including our Presenting Sponsor, **Cornerstone Brands!**

On September 16, 2022 the **Greater Miami Valley Sporting Clays** event raised over \$45,000 at the Middletown Sportsmen's Club. Thank you to our Presenting Sponsor, **Messer Construction**.



The **2022 Ladies Sporting Clays Classic (Cincinnati & Northern Kentucky)** was held at the beautiful Elk Creek Winery and raised nearly \$70,000 for local youth. Thank you to our Presenting Sponsor, **Western & Southern Financial Group** and Platinum Sponsors **Hi and Performance Lexus Rivercenter**.



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Cincinnati, OH 45203

OHIO'S FINANCIAL LITERACY LAW

School year 2022/23 was the first time the new Ohio Financial Literacy law took effect. This law requires every high school student to have one semester of financial literacy. Using the state's curriculum, JA OKI has created a program for local schools to use in satisfying this requirement. This past year, we reached 241 students.

For school year 2023/24, we will be expanding into Cincinnati Public Schools, Goshen Local Schools, Reading Community City Schools, Lockland Local Schools and Hamilton City Schools – with the expectation of reaching more than 1,000 students. Students participating in this course will receive a dynamic program that includes teacher-led and student self-guided materials. These materials include projects, case study, simulations as well as all of the materials teachers require to deliver a course that is second-to-none.

OUR SUPPORTERS

Donors Are Vital to JA's Success

Our work would not be possible without the generous support of the community. These future-focused and community-minded donors are bringing JA learning experiences to thousands of young people in our region.

Individual donors are listed alphabetically by first name.

Community Partners \$20,000+

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