

# TRANSFORM



Junior  
Achievement<sup>TM</sup>  
of North Florida

2023 Annual Report

# LETTER FROM OUR PRESIDENT & BOARD CHAIR

Dear Friends and Supporters,

It is with great pride that we reflect on the achievements and milestones within our organization and the transformational impact we have had on the lives of young people in our community. It is an honor to be able to recognize every entity who plays a part in JA's mission delivery.

As we continue to scale our reach, we have remained laser focused on student outcomes, implementing activities that spur interest, ignite youth's passion, cultivate an entrepreneurial mindset, and help spark economic development and mobility. We seek to enhance the classroom experience with JA's curriculum and resources to support teachers and school communities that otherwise would not have access to education, encouragement, and community mentorship. Our determination to fulfill our mission was evident this year, and we are thankful for the dedication of our team, volunteers, and partners.

In 2023, Junior Achievement of North Florida reached 41,759 students across 90 schools and 5 school districts. Our dedicated volunteers provided them with invaluable lessons in financial literacy, entrepreneurship, and workforce readiness, helping them build a strong foundation for their future.

We deepened our partnerships with local businesses and educational institutions, creating a network of support that empowers us to reach even more students. These partnerships are a testament to the shared commitment to the betterment of our region. Thanks to the generosity of our donors and the unwavering support of our partners, Junior Achievement of North Florida maintained a solid financial position. This stability allowed us to continue to invest in new beneficial initiatives and do meaningful work that is changing what's possible for these students.

We continued to refine and expand our curriculum, kicking off strategic planning for our Capstone facility, and offering students updated and relevant lessons that address the evolving needs of our economy. Our programs continue growing to include cutting-edge topics in technology, sustainability, and global business, preparing our youth for the opportunities and challenges of the future.

Thank you to our team at Junior Achievement of North Florida, we are continually inspired by your dedication and passion. Your hard work has made a significant difference in the lives of countless young people, and we look forward to the impact we will continue to make. Together, we are shaping a brighter future for the youth of North Florida.

As we look ahead to the coming year with optimism and excitement, we remain focused on our mission to provide young people with the knowledge and skills they need to succeed in an ever-changing world. Our commitment to fostering a generation of informed, capable, and confident individuals is unwavering. We want to express our heartfelt gratitude to our dedicated volunteers, donors, and partners who have made this year's achievements possible. Thank you to our incredible Board of Directors for their leadership, financial support, and wisdom. Your support is the cornerstone of our success.

Shannon Italia  
President

Meg Rose  
Board Chair



**MISSION:**

**JA INSPIRES AND  
PREPARES YOUNG  
PEOPLE TO SUCCEED IN  
A GLOBAL ECONOMY.**

**VISION:**

**A WORLD IN WHICH...**

**YOUNG PEOPLE  
HAVE THE SKILLSET  
AND MINDSET TO  
BUILD THRIVING  
COMMUNITIES.**

# COMMUNITY IMPACT

41,759

STUDENTS SERVED

559

EDUCATORS SERVED

1,195

VOLUNTEERS

90

SCHOOLS SERVED

5

NORTH FLORIDA  
COUNTIES SERVED

118,296

STUDENT CONTACT  
HOURS



WHICH REPRESENTS AN  
ECONOMIC VALUE OF

\$3,761,813

54.8%

FREE & REDUCED LUNCH  
STUDENTS SERVED

# PROGRAM HIGHLIGHTS

## JA HEROES

JA Heroes offers middle and high school students a hands-on opportunity to cultivate presentation skills, embrace new challenges, and make a meaningful impact. The confidence, camaraderie, and sense of purpose they acquire through this experience become evident when they step into the role of JA Heroes for a day. Their interactions with elementary school students leave a lasting impression, instilling the hope that these younger learners not only acquire vital knowledge related to JA's core principles of financial competence, entrepreneurial mindset, and work readiness, but also find inspiration in these exemplary mentors. We aim to empower elementary school students to remain committed to their education and believe in the abundance of opportunities for their future.



**323 JA Heroes volunteered in K-5 classrooms this year.**

Fort Caroline Middle School	69
Englewood High School	57
Westview K-8 School	54
KIPP Voice Academy	35
Landmark Middle School	34
Duval Charter School Baymeadows	25
William M Raines High School	25
Duncan U Fletcher High School	24

# 2,545

STUDENTS IMPACTED

# 9,386

STUDENT ENGAGEMENT HOURS

*Junior Achievement of North Florida gratefully acknowledges The Jim Moran Foundation for their generous grant that enabled the launch of the JA Heroes program in Duval County; this investment helped us provide young people with the skills and confidence to own their economic future and contribute to the economic vitality of their families, community, and country.*

# JA STOCK MARKET CHALLENGE

In 2023, Junior Achievement of North Florida launched the JA Stock Market Challenge. It began with over 200 students from four distinct high schools participating in JA Take Stock in Your Future. The highest-performing teams from each school, comprising over 70 participants, engaged in a live competition hosted at EverBank Stadium on March 30, 2023.



The JA Stock Market Challenge, along with the JA Take Stock in Your Future program, introduces high school students to the essentials of stocks, the influence of global events on stock markets, long-term investment strategies, and the decision-making process involved in diversifying investment portfolios. Following their theoretical knowledge, students apply their learning in a hands-on and technologically advanced immersive simulation known as the JA Stock Market Challenge. This experience allows students to explore both the advantages and complexities of investing in the stock market as part of a broader, sustained investment strategy, while also delving into the risks and rewards of trading. This program serves as a valuable tool to ignite students' interest in personal finance and the fundamental principles of money management, preparing them for their educational and professional journeys.

*Thank You*  EverBank

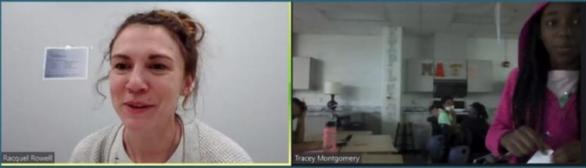
# JA INSPIRE

JA Inspire is a career exploration program that targets middle school students and introduces them to high-growth, high-demand career pathways that align with their skills, talents, and interests. The program provides an overview of North Florida's industry ecosystem and highlights jobs in the region, as well as the education required to obtain them. JA Inspire has been formally integrated into school curriculum, allowing all 8th graders across Duval and Clay Counties to participate in the virtual career fair. The program is not just about imparting knowledge, it's about inspiring these 8th graders to dream big, set goals, and aspire to make an impact in their fields, ultimately fostering a more informed and motivated workforce for the future.



## JA Career Speakers Series Virtual

THANK YOU  
@MERCEDSBENZUSA



@MERCEDSBENZUSA VOLUNTEERS:

TRAVIS BREEDEN, FIELD SERVICE ENGINEER  
TIM LOWERY, FORENSIC ENGINEER  
IAN ROODT, SUPERVISOR TECHNICAL SUPPORT  
RACQUAL ROWELL, SERVICE ENGINEER  
ANDRE VIGNOLA, QUALITY ENGINEER  
JACK WINTERS, TECHNICAL CASE MANAGER

# JA CAREER SPEAKER SERIES

The JA Career Speakers Series provides students with the chance to gain firsthand insights into various industries and companies, directly from experienced business professionals. In this program, a volunteer guest speaker visits the classroom, offering valuable insights into their career journey, work experiences, and educational background. Students are encouraged to ask questions to delve further into topics that pique their interest. Key focus areas include careers, career paths, education, and the development of soft skills.

## JA DAYS

JA collaborates with elementary schools serving low to moderate-income communities to deliver JA educational programs, which are facilitated by volunteer professionals from the business world. JA Days serve as a highly efficient means for volunteer groups to impart JA's curriculum to one or more grade levels within a single day. These events offer a structured platform for businesses to engage in impactful, one-day employee participation experiences.



*"We are grateful for our partnership with JA. The opportunity for students to hear from someone different than a classroom educator provides them with important life lessons that they may not get from traditional education." - Principal Matt Walker, Beauclerc Elementary*

# TRANSFORMATIONAL MOMENTS

Smart Women Make Change – June 2023



Golf Classic – September 2022



Bowl-a-Thon with Deutsche Bank - April 2023



# 2023 HALL OF FAME



**HALL OF FAME LAUREATE**  
Andy Kaufmann  
Owner/CEO - Zawyer Sports



**VOLUNTEER OF THE YEAR**  
Jason Miller  
Johnson & Johnson  
Vision Care



**EDUCATOR OF THE YEAR**  
Diedre McNair-Pickney  
Duval County Public  
Schools



**COMPANY OF THE YEAR**  
EverBank

*"In our special city of Jacksonville lies the individuals who devote themselves to uplifting others, propelling the future of our children within it. JA of North Florida is spearheading a movement dedicated to leaving a positive imprint on our community through their programs in financial literacy, work readiness, and entrepreneurship. JA not only inspires these young minds to dream but equips them with the means to turn those dreams into reality, enabling them to contribute back to the city we proudly call home."*

*- Andy Kaufmann*

# TRANSFORMATIONAL VOLUNTEERS

Junior Achievement inspires and prepares young people to plan for their futures. Our mission involves mobilizing the business community to actively engage as volunteers in K-12 classrooms, leading JA educational experiences centered on fostering work and career readiness, entrepreneurship, and financial literacy. These dedicated JA volunteers assume the role of mentors, positively influencing young people’s perspectives on the value of education and the development of vital life skills.

In the 2022-2023 school year, a remarkable total of 1,195 volunteers took the lead in facilitating JA learning experiences across North Florida. We extend our heartfelt appreciation to our committed network of volunteers who generously contribute their time to enhance the lives of students, strengthen families, and uplift our communities.

## TOP 10 VOLUNTEER SOURCES FOR 2022-2023



Deutsche Bank



# THANK YOU!

**OUR THANKS TO THE FOLLOWING ORGANIZATIONS WHO SUPPORTED  
EMPLOYEE VOLUNTEER ENGAGEMENT WITH JUNIOR ACHIEVEMENT THIS YEAR.**

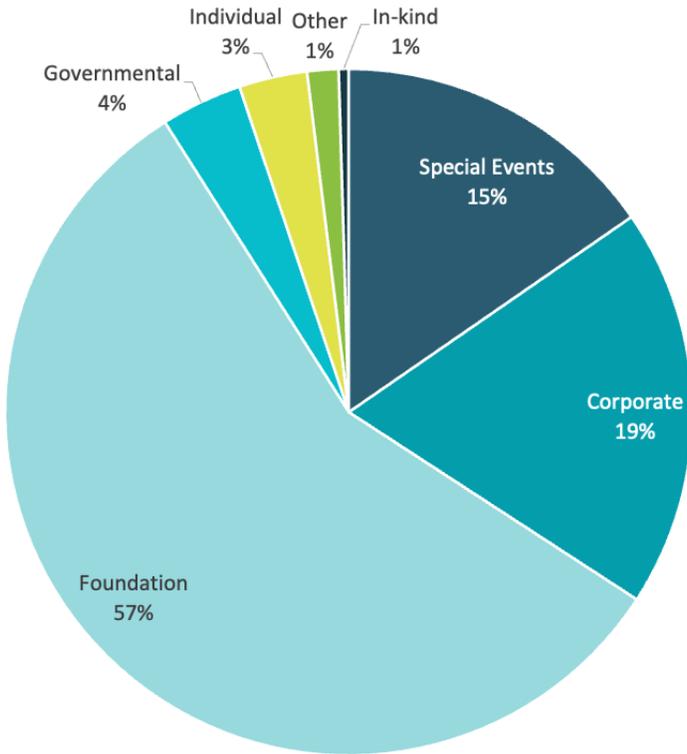
Accenture  
Air National Guard  
Alive Credit Union  
**Ally Financial**  
Arby's Restaurant Group, Inc.  
Arlington Park Funeral Home  
At the Table Life Coaching & Motivational Speaking  
Services, LLC  
BAE Systems  
**Bank of America**  
**Baptist Medical Center Jacksonville**  
Berkshire Hathaway Energy Company  
Black Knight  
Borland Groover  
Capital City Bank  
Carr, Riggs & Ingram, LLC  
Centennial Bank  
Charles Rivers Associates  
**Citibank**  
Citizens Bank  
City of Jacksonville  
Coca-Cola Company, The  
Coldwell Banker Hartung and Noblin, Inc.  
Crowley Maritime  
CSX  
Daily's  
Delores Barr Weaver Policy Center  
**Deutsche Bank**  
Ecolab  
Ensafe Jacksonville  
**Ernst & Young**  
EverBank  
Federal Bureau of Investigation  
**Fidelity Investments**  
Fifth Third Bank  
First Citizens Bank  
First Command Financial Planning  
First Horizon Bank  
**FIS**  
Florida Army National Guard-Jacksonville  
Florida Blue  
Florida Department of Education  
Florida Department of Environmental Protection  
Florida Office of Financial Regulation  
**Florida State College of Jacksonville**  
**Florida State University**  
FSU Credit Union  
Gulf Winds Credit Union  
Haskell  
Jacksonville Fire and Rescue Department  
Jacksonville Icemen  
Jacksonville Jaguars

**Jacksonville Sheriff's Office**  
Jacksonville University  
Jaxport  
**JEA**  
**Johnson & Johnson Vision Care**  
**JPMorgan Chase & Co.**  
Magellan Federal  
Malivai Washington Kids Foundation  
Mayo Clinic  
**Mercedes-Benz USA**  
Miller Electric Company  
Morgan Stanley  
**Navy Federal Credit Union**  
NLP Logix  
Northeast Florida Builders Association  
PGA Tour Inc.  
**Pivot CPA's**  
**PNC Financial Services**  
Prime Realty  
Publix Super Markets, Inc.  
**PwC**  
Radifi Credit Union  
Regions Bank  
**Rotary Club of Jacksonville**  
RSM US LLP  
Seven Hills Financial  
SHRM Jacksonville  
Six Points QB Training  
**SoFi**  
South State Bank  
Southeastern Grocers  
Southern Grounds  
St. Johns County Sheriffs Office  
Synovus  
TD Bank  
The Front Line Agency  
Tom Bush Family of Dealerships  
Truist  
United States Air Force  
United States Army  
United States Coast Guard  
United States Marine Corps  
United States Navy  
University of Florida  
University of North Florida  
US Bank  
USAA  
**Voya Financial**  
Wells Fargo

*Companies in **BOLD** had 10 or more unique volunteers in 2022-2023*

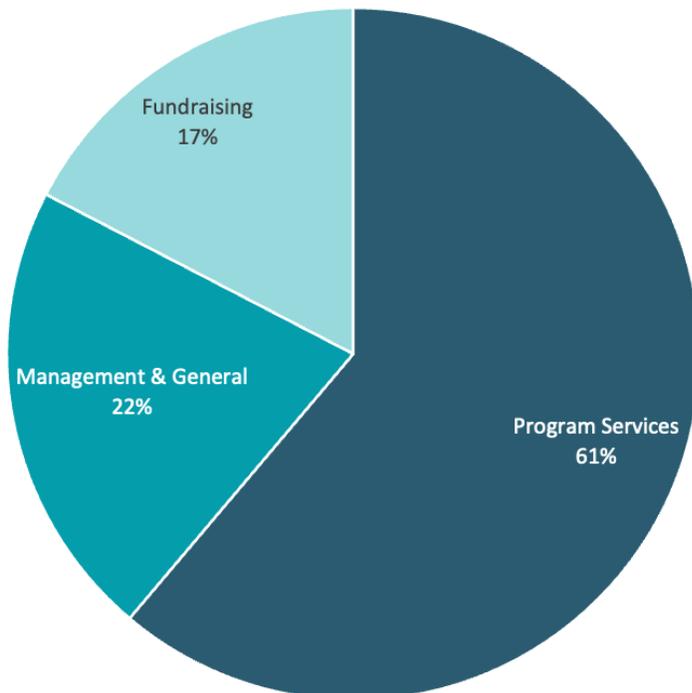
# FINANCIALS

Audited Financials for Fiscal Year July 1, 2022 - June 30, 2023



## REVENUE.....\$2,001,177

- Special Events.....\$307,680
- Corporate.....\$376,469
- Foundation.....\$1,137,093
- Governmental.....\$76,775
- Individual.....\$64,171
- Other.....\$29,489
- In-kind.....\$9,500



## EXPENSES.....\$1,307,536

- Program Services.....\$799,788
- Fundraising.....\$280,603
- Management & General.....\$227,145

# BOARD OF DIRECTORS

## EXECUTIVE COMMITTEE

Meg Rose, Chair, Retired Executive, Firehouse Subs  
Tim Hamilton, Chair- Elect, Valley National Bank  
Scott Finnegan, Treasurer, Baptist Health  
Charlie Saman, Secretary, Radifi Credit Union  
Mary Ann Callahan, Immediate Past Chair, Citizens Bank  
Lisa O'Neill, Past Chair, Retired Executive, DTCC  
Bob Wall, Past Chair, Retired Executive, Guidewell

## MEMBERS

Wendy Alexaitis, hueman  
Carl Bailey, Actuary  
Denise Boykin, TD Bank  
Matthew Ceballos, Fidelity Investments  
Lauren DeAlexandris, CSX  
Jim Deats, B of A/Merrill Lynch  
Jeff Edwards, Beaver Street Fisheries  
Nader Farhat, PwC  
Kevin Gannon, Suddath  
Chris Haley, FINTOP Capital  
Courtney Harris, Florida Blue  
Jeremy Harris, EY  
Andrew Harrison, Bank of America  
Kevin Holbrooks, JEA  
Elaine Johnson, Excelan Advisors  
Josh Johnson, Johnson & Johnson Vision Care  
Patty Keenan, Miller Electric  
Treve Kinsey, Transworld Business Advisors

Jennifer Kirouac, First Horizon Bank  
Mike Knox, PNC  
Andrew Kurz, Ring Power  
Eric Loller, EverBank  
Shelbi MacDonald, Citi  
Jeff Machols, VOYA Financial  
Luke O'Steen, Plan Analysts  
Shehani Ranadewa, Deutsche Bank  
Nate Rozof, FIS  
Rob Sandlin, Florida Rock & Tank Lines  
David Sillick, Sillick, Inc.  
Trish Skoglund, Crowley  
Jason Spencer, Regions Bank  
Richard Stein, Jr. , Wellhouse Company  
Eric Swanson, KPMG  
Shatara Troy, Uptime Solutions  
John Wall, Florida State College Jacksonville

## EMERITUS MEMBERS

Mike Clements, Clements Publishing  
Fred McGinnis, Retired Owner, McGinnis & Associates

*Board Members as of June 30, 2023*

*“At Junior Achievement of North Florida, our purpose is to empower the upcoming generation of leaders to reach their potential. As a dedicated board of directors, we wholeheartedly embrace our goal of equipping students for real-world challenges that await them, as they navigate both their professional and personal lives. We strive to ignite the potential in each student, nurturing a profound sense of purpose and cultivating a vision for a brighter future.” - Patty Keenan*

# GIVING LEVEL\$

## **\$75,000 and up**

MacKenzie Scott  
Mercedes Benz USA  
The Jim Moran Foundation, Inc.

## **\$50,000-74,999**

Duval County Public Schools  
Lucy Gooding Charitable Foundation Trust

## **\$30,000-49,999**

Citibank  
EverBank  
Fidelity National Information Services  
Fidelity Investments

## **\$20,000-29,999**

Citizens Bank  
Deutsche Bank  
Firehouse Subs  
Florida Blue  
Florida Rock & Tank Lines, Inc.  
Johnson & Johnson Vision Care  
Publix Super Markets Charities, Inc.  
The UPS Stores

## **\$10,000-19,999**

Adesis, Inc.  
Bank of America  
Baptist Health System, Inc.  
Bastian Solutions  
Beaver Street Fisheries  
BHE GT&S, LLC  
CSX Corporation  
Delores Barr Weaver Forever Event Fund  
First Coast Energy LLP  
Florida Power & Light Company  
Front Line Strategies  
JEA  
Miller Electric Company  
Remmer Family Foundation  
Ring Power Corporation  
Southeastern Grocers, Inc.  
Suddath Global Logistics  
Synovus Bank  
The UPS Foundation  
Walmart

## **\$5,000-9,999**

Ally Financial  
Amwins  
Arby's Foundation  
Bestbet holdings, Inc.  
Black Knight  
Bob Wall  
Borland Groover  
Crowley  
Ecolab  
Ernst & Young, LLP  
Excelan Advisors, LLC  
First Citizens Bank  
Florida Agricultural & Mechanical University  
Florida State University, Jim Moran College of  
Entrepreneurship  
FSU Credit Union  
Gelest  
Heil Trailer International, Inc.  
Hood Container  
Island Transport  
Jim Moran Institute  
JP Morgan Chase  
Meg Rose  
NAIFA Jacksonville Chapter  
Nextran Truck Center  
Nordstrom  
Ortec Inc.  
PNC  
Radifi Credit Union  
Regions Bank  
Rotary Club of Jacksonville  
The Ryder Charitable Foundation  
Scott Finnegan  
Shatara Troy  
Snider Fleet Solutions  
SouthState Bank  
State Farm  
Taco Bell Foundation  
Tallahassee Community College  
The Community Foundation for NE Florida  
Transworld Business Advisors  
Turtle & Hughes, Inc.  
US 1 Logistics LLC  
Vystar Credit Union  
The Winston Family Foundation  
W.W. Gay Mechanical  
The W.W. & Eloise D. Gay Foundation  
Vystar Credit Union – Tallahassee

# BOUNDLESS POSSIBILITIES

## **\$2,500-4,999**

Ally Financial  
Ascendo  
Billie Nimnicht III  
Carl Bailey  
Charity Golf International  
Clay Electric Foundation, Inc.  
First Horizon Bank  
FSU Credit Union  
Gannett Foundation  
Gulf Winds Cares Foundation, Inc.  
Icebreakers Bar & Grill  
Jacksonville Jaguars Foundation, Inc.  
KPMG LLP  
Lift Power, Inc.  
Lisa O'Neill  
Lockton  
Mansfield Oil Company of Gainesville, Inc.  
Marcus Rowe  
National Interstate Insurance Company  
PGA Tour, Inc.  
Pivot CPAs  
PriceWaterhouse Coopers  
Synovus Bank – Tallahassee  
SZH Hockey, LLC  
University of North Florida  
Valley National Bank

## **\$1,000-2,499**

Accenture  
Campus USA Credit Union  
Carolyn Wedel  
Carr, Riggs & Ingram  
Central Credit Union of Florida  
Charles River Associates  
Cindy Cooper  
City of Tallahassee  
David White  
Envision Credit Union  
First Commerce Credit Union  
Florida State College of Jacksonville  
Foundation, Inc.  
Gerard LaMothe  
JAXPORT  
Jeff Edwards  
Jeffrey Armstrong  
Mindy and Dave Hinaman Charitable Fund  
Robin Wahby  
Seven Hills Financial  
Tim Hamilton

## **THE APPROACH**

Our approach to education is distinctive, as it embraces innovative methods of contextual learning through collaborative partnerships with educators, employers, and the broader community.

## **THE PROMISE**

Our promise is to provide specialized learning experiences that help young people reach their potential and position students for life success.



**Junior  
Achievement™**  
of North Florida

# GET INVOLVED

We offer volunteer openings tailored to elementary, middle, and high school students, catering to both individuals and entire teams or divisions. There's no more rewarding experience than knowing you have ignited a child's inspiration. Join us and be a part of the journey to help students discover their potential for the future.



## ▶ K-5

Elementary School programs illustrate how people assume roles as individuals, workers, and consumers in an expanding environment that extends from the self to global relations.

- JA Days

## ▶ MIDDLE SCHOOL

Middle School programs promote the economics of households, businesses, and the world marketplace. An extra emphasis is placed on staying in school, including an examination of the personal and societal impact of not completing a high school education.

- JA Career Speaker Series
- JA Inspire
- JA Heroes

## ▶ HIGH SCHOOL

High School programs focus on workforce preparation by preparing young people for their future roles, whether on the job or in continuing their education. Activities are geared toward real-world training through a series of programs that help students develop the knowledge, skills, and attitudes to become productive citizens and workers.

- JA Personal Finance
- JA Take Stock in Your Future
- JA Career Fairs
- JA Heroes

# OUR TEAM

At the core of our success is a wealth of experience, with seasoned professionals from the fields of education and youth development, spearheading our mission within the community. We have built strong and trusted relationships with our corporate supporters, enabling them to connect and engage with our community. What makes our team special is the passion we share for our work, as we wholeheartedly believe in the cause and are delighted to be on the front lines of change for the young people in our community. This collective excitement for our mission has fostered a profound sense of community, collaboration, and love within our team, making us a united and close-knit force working together for the betterment of our community.



*“Working for Junior Achievement, our mission is to provide the tools that ignite a passion for education and change what’s possible for students. I believe that by being leaders in our community, we serve not only the young minds locally but also the future of our world. Education is the bridge that connects us all, and by nurturing it with dedication and heart, we build a stronger, more united tomorrow, where every child can dream, believe, and achieve.” - Tiffany Guthrie*

THANK  
YOU!

Junior Achievement of North Florida, Inc.®  
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Jacksonville, FL 32207

**(904) 398-9944 | [janfl.org](http://janfl.org)**