

2021-2022 ANNUAL REPORT



**Junior
Achievement**[™]
of Oklahoma



Our Challenge

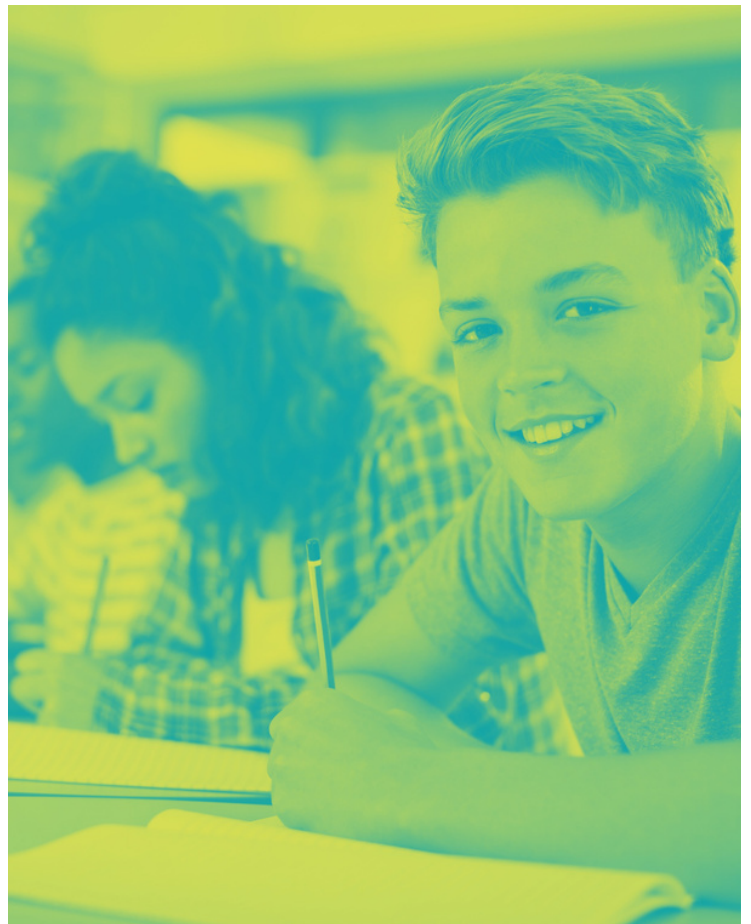
Many students in our state do not have equal access to education on financial literacy, career readiness, or entrepreneurship. The pandemic has created even more barriers to reach students with hands-on education that can help their future financial success.

At Junior Achievement of Oklahoma, we are dedicated to providing solutions to students early on that benefit not only those individual students' success but the success of our state by further developing the Oklahoma workforce.

Our Mission

Junior Achievement's purpose is to inspire and prepare young people to succeed in a global economy.

Our mission is the part Junior Achievement plays in our wider vision for the future, the day-to-day work we do for the thousands of young people we serve. Though Junior Achievement, Oklahoma youth will be inspired and prepared to succeed in whatever the global economy brings.



Our Values

How we approach our work is as important as our mission. Six values reflect the culture of Junior Achievement and raise the bar for our interactions within and outside of the JA network.

BELIEVE

in the boundless potential of young people

SEEK OUT

diverse backgrounds, perspectives, and talents in our staff and volunteers, and boards to reflect the geographies and communities we serve

APPROACH

our work with passion, honesty, integrity, and excellence

TEACH

principled, market-based economics and entrepreneurship that build a more sustainable world.

ADVOCATE

for relevant hands-on learning

NURTURE

the power of partnership and collaboration



Our Year at a Glance

Program Impact

35,497 STUDENTS EMPOWERED

1,216
CLASSROOM
EXPERIENCES

827
INSPIRING
TEACHERS

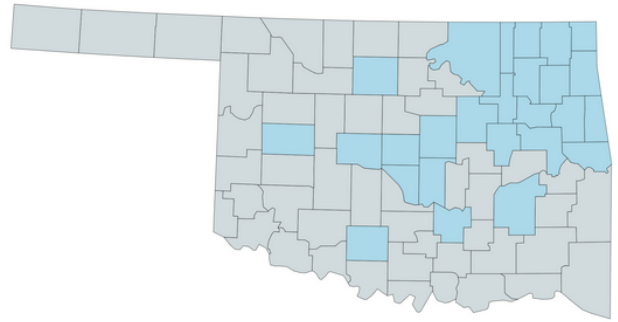
2,904
INVESTED
VOLUNTEERS

677,513
CONTACT HOURS

216
SCHOOLS

82

SCHOOL DISTRICTS REACHED



Ada Public Schools
Bartlesville Public Schools
Belfonte Public Schools
Berryhill Public Schools
Bethel Public Schools
Bixby Public Schools
Briggs Public Schools
Broken Arrow Public Schools
Caney Valley Public Schools
Cave Springs Public Schools
Central Independent School District
Chelsea Public Schools
Claremore Public Schools
Clinton Public Schools
Collinsville Public Schools
Coweta Public Schools
Crooked Oak Public Schools
Dahlongegah Public Schools
Diocese of Tulsa Ed Office
Duncan Public Schools
Earlsboro Public Schools
Edmond Public Schools
Enid Public Schools
Fort Gibson Public Schools
Grand View Public Schools
Hilldale Independent School District
Holland Hall Preparatory Schools
Hulbert Public Schools
Immanuel Lutheran Christian Academy
Inola Public Schools
Jay Public Schools
Jenks Public Schools
Ketchum Public Schools
Kiefer Public Schools
Legacy Christian Academy
Liberty Public Schools
Locust Grove Public Schools
Mannford Public Schools
Marble City Public Schools
McAlester Public Schools
McLoud Public Schools

Metro Christian Academy
Miami Public Schools
Midwest City - Del City Public Schools
Millwood Public Schools
Moore Public Schools
Moore Public Schools
Muldrow Public Schools
Muskogee Public Schools
Norman Public Schools
Nowata Public Schools
Oklahoma City Public Schools
Oklahoma Union Public Schools
Okmulgee Public Schools
Oktaha Public Schools
Oologah-Talala Public Schools
Osage Public Schools
Owasso Public Schools
Peggs Public Schools
Prague Public Schools
Pryor Public Schools
Putnam City Public Schools
Rejoice Christian Schools
Roland Public Schools
Sallisaw Public Schools
Sand Springs Public Schools
Sapulpa Public Schools
Shawnee Public Schools
Stroud Public Schools
Summit Christian Academy
Tahlequah Public Schools
Tecumseh Public Schools
Tulsa Public Schools
Union Public Schools
Verdigris Public Schools
Victory Christian Schools
Warner Public Schools
Western Heights Public Schools
Westville Public Schools
Woodall Public Schools
Wright Christian Academy
Yukon Public Schools

Includes private schools, home schools, and other organizations

Our Supporters

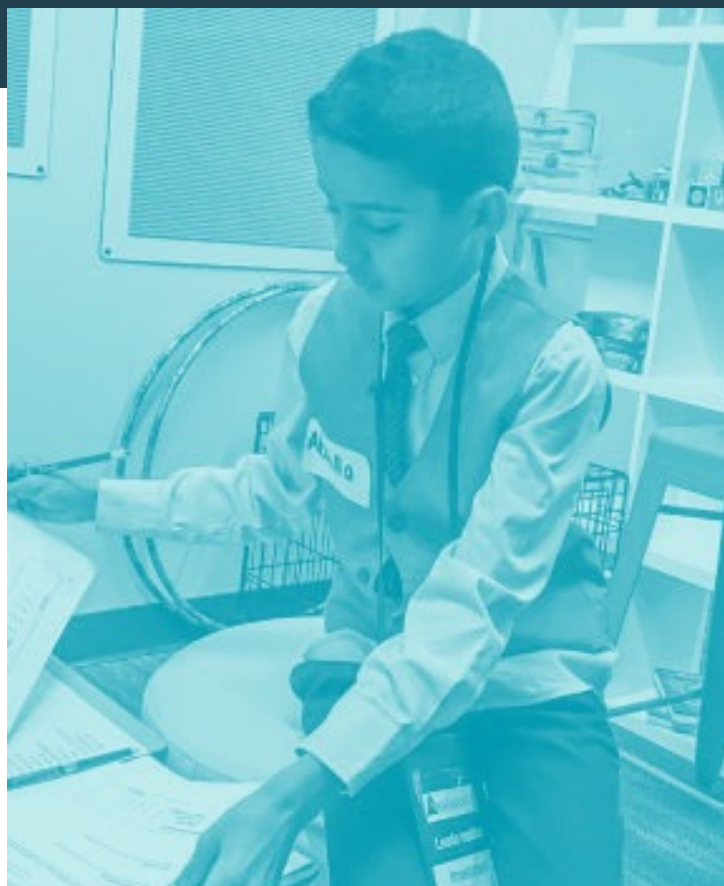
Thank you to all companies, foundations, and individuals who invested in the future of Oklahoma students.

\$30,000 and Above

AAON, Inc.
Chick-fil-A
Devon Energy Corporation
Herman Meinders
ImageNet Consulting
JD Young
Masonic Charity Foundation of Oklahoma
Michael Simmons Charitable Foundation, Inc.
The J.E. and L.E. Mabee Foundation

\$15,000 to \$29,999

AT&T OKC
Bank of America - Merrill Lynch
Bank of Oklahoma
Charles and Lynn Schusterman Family Philanthropies
Chesapeake Energy Corporation
Cox Business
Ernst & Young
HF Sinclair
John Steele Zink Foundation
MidFirst Bank
OGE
Robert Glenn Rapp Foundation
T.D. Williamson, Inc.
Taco Bell Foundation
Tulsa Tech
W&W | AFCO Steel
The Williams Companies
Wood Kaufman



\$10,000 to \$14,999

American Fidelity
BancFirst Corporation
Bank of the West
CCK Strategies, PLLC
Cherokee Nation Businesses
Cherokee Nation Foundation
Commerce Bank
CSAA Insurance Services, Inc.
Hillcrest Healthcare System
Lamar Advertising Company
Oklahoma Department of Commerce
Paycom
PediStat
Phillips 66
Quiktrip Corporation
Reasor's
SageNet, LLC
Sarkeys Foundation
The Anne and Henry Zarrow Foundation
The Clyde R. Evans Charitable Trust

\$5,000 to \$9,999

Accent Realtors
AGC of Oklahoma
Andy B's
Arby's Foundation
Capital One Auto Finance
Central Bank
Continental Resources
Edward & Helen Bartlett Foundation
Gateway First Bank
Grant Thornton
Heartland Payment Systems, Inc.
InHouse Advertising, LLC
Junior Achievement USA
Linde Engineering Americas
Mabrey Bank
Marty Grunst
Matrix Service Company
Oklahoma Energy Resources Board
PwC
Scott and Margee Filstrup
Simmons Bank
Stephen and Judi York
Tall Oak Midstream Management, LLC
Temple Foundation
The Consultants, Ltd.
US Silica
Webco Industries, Inc.



\$3,000 to \$4,999

Admiral Twin Drive-In
American Electric Power
Brenda Bolander
Brian Urich
City National Bank & Trust Co.
Commerce Bank
Cowboy Sports Properties
Cox Communications
CrossFirst Bank
Deloitte & Touche LLP
Great Plains Bank
John Eaton
Lori Pumphrey
McIntosh Corporation
Mercedes-Benz of Oklahoma City
Osage Casino Hotel
Randy Peck
Security Bank
Spur Design
Sygma Network
TTCU Cares Foundation, Inc.



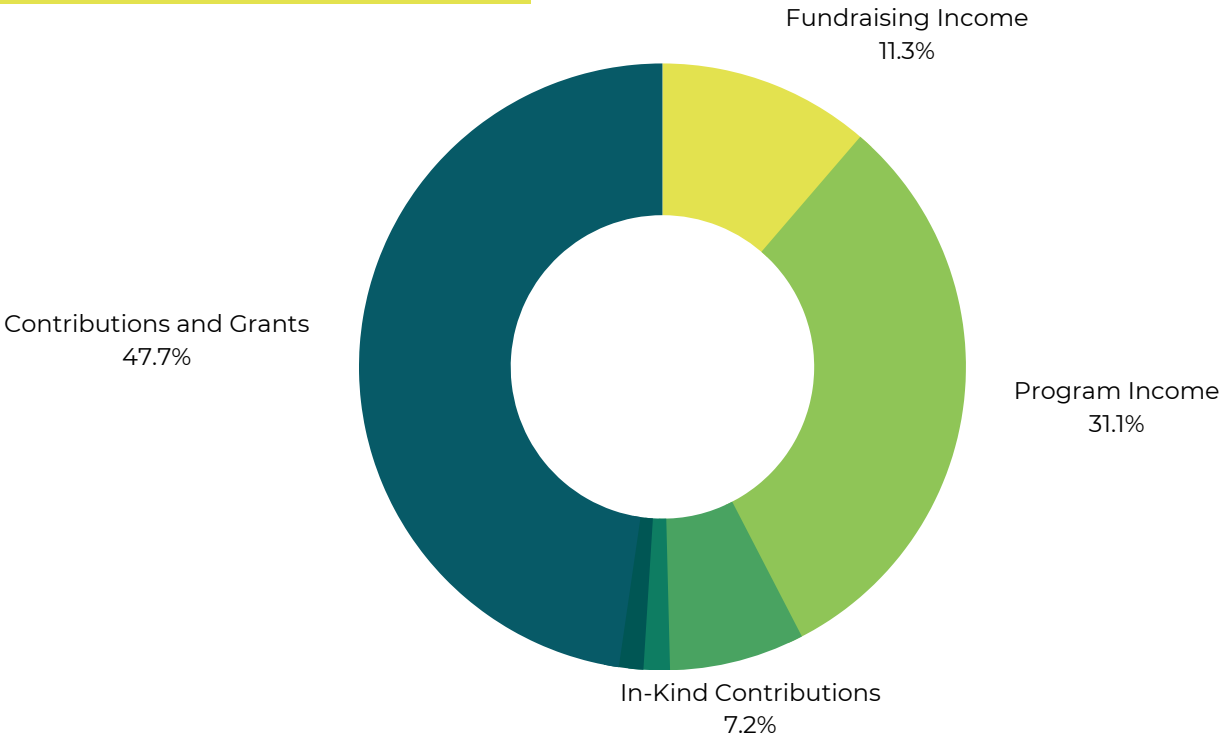
Our Financials

Statement of Financial Position

| Assets | 2021 | 2020 |
|---|--------------------|--------------------|
| Cash and cash equivalents | \$737,576 | \$545,621 |
| Endowment funds | \$90,749 | \$52,298 |
| Pledges receivable, net | \$88,296 | \$266,295 |
| Prepaid expenses | \$35,019 | \$28,607 |
| Investments | \$393,064 | \$303,952 |
| Pledges receivable, net - restricted | \$79,643 | \$112,016 |
| Endowment funds - restricted | \$482,232 | \$482,232 |
| Property and equipment, net | \$1,939,185 | \$2,046,861 |
| Total Assets | \$3,845,764 | \$3,837,882 |
| | | |
| Liabilities | | |
| Accounts payable | \$6,306 | \$5,080 |
| Accrued liabilities | \$15,241 | \$5,893 |
| Notes payable | \$297,938 | \$554,744 |
| Total Liabilities | \$319,485 | \$555,717 |
| | | |
| Net Assets | | |
| Without donor restrictions | \$2,964,404 | \$2,687,917 |
| With donor restrictions | \$561,875 | \$594,248 |
| Total Net Assets | \$3,526,279 | \$3,282,165 |
| | | |
| Total Liabilities and Net Assets | \$3,845,764 | \$3,837,882 |

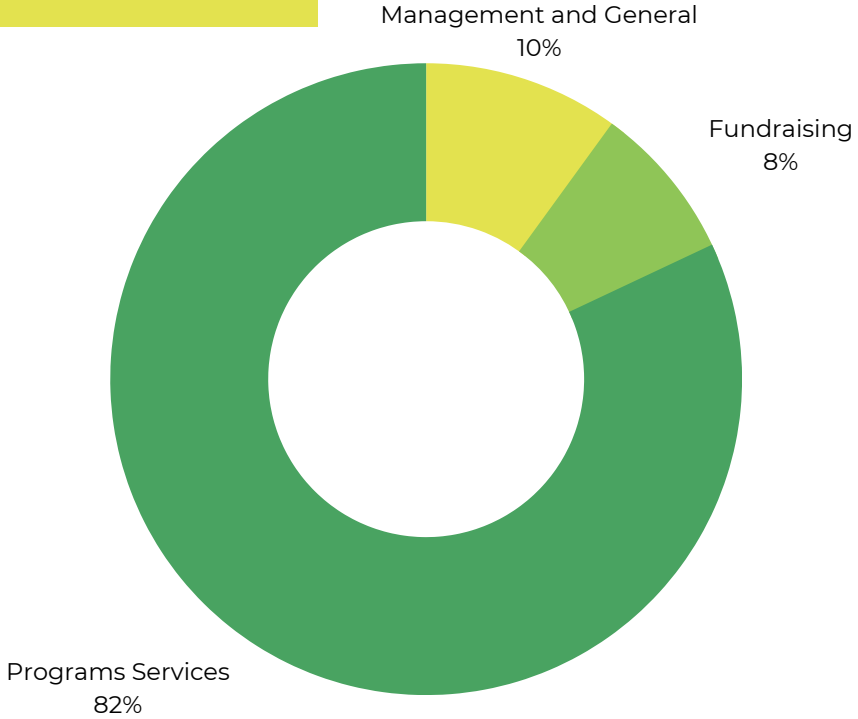
Total Income

\$2,345,307



Total Expenses

\$1,986,727



Our Leadership

Board of Directors

STATE BOARD OF DIRECTORS

Pat Piper, Retired | *State Board Chair*
Adam Albright, Founder & Principal Consultant | Pragma Resources
Mark Blongewicz, Shareholder & Director | Hall Estill
Dr. Stacey Butterfield, Superintendent | Jenks Public Schools
Duane Chalmers, F&A Special Projects Director | Williams
John Curzon, Founding Partner | CCK Strategies, PLLC
John Eaton, Partner | Ernst & Young
Todd Gourd, CIO | Cherokee Nation Businesses
Jennifer Jezek, President & Owner | York Electronic Systems
Wes Michell, Director of Business Services | Workforce Tulsa
Mark Mote, Partner | Ernst & Young
Dr. Clarence Oliver, Dean Emeritus | Oral Roberts University

OKC BOARD OF DIRECTORS

Mark Mote, Partner | Ernst & Young | *OKC Board Chair*
Adam Albright, Founder & Principal Consultant | Pragma Resources
Eddie Blankenship, Director of Sales | Cox Communications
Brenda Bolander, Executive Vice President | Retirement Investment Advisors, Inc.
Chris Childress, Senior Vice President, Business Banking Manager | Bank of Oklahoma
John Christ, Vice President, Internal Audit | Chesapeake Energy Corporation
Deano Cox, Legislative Affairs | AT&T OKC
Jolene Curry, Business Development Manager | Flintco, LLC - Noble
Brent Douglas, President | Magellan Executive Partners
David Hardy, Executive Vice President, Commercial Banking | IBC Bank Oklahoma
Erick Harris | Harris Law Group, PLLC
Chadwick Holeman, Counsel | Devon Energy Corporation
Keith Johnson, National Director of Sales | American Fidelity Assurance
Gregory Jones, Partner | Eide Bailly
Rachel Kanady, Vice President of Agency Development | NFP
Patrick Karry, Regional Retail Manager | First United Bank and Trust Company
Wood Kaufman
Kendall King, CEO | Castleview Wealth Advisors
Tosha Lackey, Founder | Caffeinated Consulting
Giovanni Monterroso, Financial Educator | Tinker Federal Credit Union
Max Myers, CFO | Tall Oak Midstream Management, LLC
Randy Peck, Executive Vice President | Midfirst Bank
Donna Popp, Vice President, Commercial Relationship Manager | Arvest Bank
Janis Reeser, Executive Vice President/Director of Education | Oklahoma Bankers Association
Nathan Rice, Partner | PwC
John Rogers, CFO | W&W | AFCO Steel
Earl Stone, Partner | Deloitte & Touche
Chuch Walworth, Treasurer | OGE Energy Corp.
Ronda Walzer, Senior Manager | Love's Travel Stops & Country Stores
Ryan Ward, OKC Metro Division President | Great Plains Bank
Cary Watson, Vice President of Safety, Environmental and Technical Programs | Enable Midstream Partners

TULSA BOARD OF DIRECTORS

John Curzon, Founding Partner | CCK Strategies, PLLC | *Tulsa Board Chair*
Scott Asbjornson
Darryl Baskin, Broker-Associate | Baskin Real Estate Specialists, eXp
Rick Bennett, Vice President & CIO | Matrix Service Company
Mark Blongewicz, Shareholder & Director | Hall Estill
Dr. Kim Boyd, Dean, College of Education | Oral Roberts University
Jason Butler, Audit Partner Grant Thornton
Dr. Stacey Butterfield, Superintendent | Jenks Public Schools
Jay Calhoun, Partner | Apis Holdings
Sandi Calvin, Assistant Superintendent | Union Public Schools
Duane Chalmers, F&A Special Projects Director | Williams
David Chen, Owner & Operator | Chick-Fil-A
Dave Cleveland, Managing Partner | Corporate Performance Group
Kevin Cooper, Senior Relationship Manager | Bank of Oklahoma
Amber Deramus, Senior Vice President | Central Bank of Oklahoma
Sherry Durkee, Superintendent | Sand Springs Public Schools
John Eaton, Partner | Ernst & Young
Scott Filstrup, President & CEO | The Consultants, Ltd.
Dr. Robert Franklin, Associate Superintendent, Student Affairs | Tulsa Tech
Dr. Deborah Gist, Superintendent | Tulsa Public Schools
Todd Gourd, CIO | Cherokee Nation Businesses
Marty Grunst, Executive Vice President & CRO | Bank of Oklahoma Financial
Thomas Hay, Senior Vice President | Bank of Oklahoma
Isaac Helmerich, Associate | Hall Estill
Kelly Hewitt, Vice President, Wealth Management | Morgan Stanley
Jennifer Jezek, President & Owner | York Electronic Systems, Inc.
Angela Kouplen, Interim CIO | The University of Tulsa
Shawn Kruggel, Vice President, Director of Creative Strategy | Medium Giant
Kevin McManus, Partner | PwC
Monte McNutt, Production Specialist | JD Young
Wes Mitchell, Director of Business Services | Workforce Tulsa
Sara Momper, Vice President, CAO | Helmerich & Payne
Dr. Clarence Oliver, Dean Emeritus | Oral Roberts University
Michael Oonk, Executive Vice President & COO | American Bank & Trust Company
Jonathan Pinto, Managing Partner | The Curate Group
Pat Piper, Retired
Gary Provine, Retired
Lori Pumphrey, CFO | US Beef Corporation
Pat Selcer, Vice President & General Manager | Lamar Advertising
Eric Shepard, Senior Vice President, Regional Manager | Arvest Bank
Dr. Lana Turner-Addison, Director | Pine Premier Child Care
Brian Urich, Financial Analyst | American Electric Power
Greg Wagner, Retail Banking Executive, Senior Vice President | Gateway First Bank
Stephen York, Retired

Our Staff

Junior Achievement of Oklahoma

LEADERSHIP

Shannan Beeler, President
Erica Irvine, Vice President of Operations
Debbie Weierbach, Vice President of Administration
Amber Shelton, Regional Director | OKC

ADMINISTRATION

Marie Angle, Administrative Manager
Tracey Beesley, Administrative Assistant
Sandra Brown, Database Administrator

MARKETING

Katy Blissit, Marketing and Communications Manager

DEVELOPMENT

Terry Billen, Development and Events Manager | OKC
Brian Jackson, Development Manager | Tulsa
Lisa Morgan, Development Manager | Tulsa
Martha Rongey, Senior Events Manager | Tulsa

EDUCATION

Robyn Brown, Program Director | Tulsa
Jon Harris, Program Manager | Tulsa
Kellen Mack, Program Manager | OKC
Mary Lou Robinson, JA BizTown Manager | Tulsa
Taylor Simmons, Program Manager | Tulsa
Mary Thomas, Senior Program Manager | OKC
Christina Williams, JA BizTown Manager | Tulsa