



## Volunteer Manual State Farm Insurance

### Helpful Hints

Thank you for volunteering to assist the students at *JA BizTown*. Your role is critical in enabling the day to run smoothly. Please read and use the helpful hints listed below as you work with this business. **At any point, if you have any questions or concerns, please hang the sign with a red question mark outside your business and a *JA BizTown* staff member will assist you.**

1. The Professional Office will borrow money from the Bank. The Agency Executive will take the **Loan Application** and **Promissory Note** to the Bank after the National Anthem.
2. After entering the Loan Amount from the **Business Costs Sheet**, the CFO should print a \$5.00 check to Distribution Depot, then enter the employee information and print payroll checks for both Pay Period 1 and Pay Period 2 before the Opening Town Meeting.
3. When the CFO takes a business deposit to the Bank, the deposit will consist of a business deposit ticket and the multiple checks making up the total deposit. Remind the CFO that he/she should not create a deposit ticket for each check, but should wait until he/she has about 4 checks before preparing a deposit.
4. Instruct employees to follow all equipment directions carefully and ask for assistance from the *JA BizTown* staff, if anything concerning computers is unclear or not working. **DO NOT try to fix it yourself!**
5. The Agent will go to Distribution Depot with the \$5.00 check from the CFO for supplies.
6. **Be sure you and the students use dry erase markers on any laminated sheets!**

Have a great day!



## **Facilitator Directions**

### **START-UP TIME - 45 minutes**

Start-Up Time lasts a total of 45 minutes. This Start-Up time involves:

- **First 10-15 minutes is uninterrupted time for Staff Meeting #1.** This meeting allows time for the discussion listed below and time for students to read their own Job Simulation binders.
- At the conclusion of this uninterrupted time, the National Anthem signals that those students whose jobs take them out into JA BizTown may begin to perform their tasks.
- All employees remain in their business to continue with Start-Up tasks unless their job requires them to leave.
- At the conclusion of the 45 minutes, and JA BizTown staff member will request all employees to come to the green carpet for the Opening Town Meeting.

#### **Staff Meeting #1**

Gather your employees around you. Spend about 10 minutes to complete the following:

#### **Introduce yourself and meet the business employees.**

Ask the Agency Executive to hand out each employee's name tag (if applicable) and personal checkbook, which are located in the BizPrep Envelope they brought from school.

Ask students to introduce themselves and state their job title. Using the Break Schedule found on the bulletin board in your business, write each student's name in the correct space and inform him or her of their break period (A, B, or C).

#### **Assist students in preparation of their checkbooks for the first trip to the Bank:**

Ask students to open their checkbooks. Review their deposit ticket, \$1.50 check payable to the Bank for their savings account, and the entries written in the check register. There is no money in their account until they actually deposit the paycheck.

The first deposit ticket should show their net pay (see chart below) and up to \$2.00 in cash back. The amount of the net deposit (net pay minus cash back) should be written on the first line of their check register.



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Use this chart to confirm each employee's net pay:

Job Title	Gross Pay	Net Pay
Agency Executive	\$9.00	\$8.82
CFO	\$8.50	\$8.33
Agent	\$8.00	\$7.84

If these steps have not been completed at school, help the students complete these tasks now. (Refer to the "Check It Out" Poster in your business).

Advise employees that when it is time for their first break, they will need to deposit their paycheck and receive any cash back before going to lunch.

Ask the employees to get their Job Simulation binder and begin reading the information to become familiar with their job responsibilities.

Have the CFO begin working as soon as possible. Check with the CFO to be sure he/she has printed a \$5.00 check to Distribution Depot for business supplies and has begun entering the employee names and payroll information into the computer. Payroll checks for Pay Period #1 and Pay Period #2 should be printed and signed before the Opening Town Meeting.

All employees should begin working, but remind them that they may not leave the business until after the National Anthem.

### Opening Town Meeting

JA BizTown staff will instruct students to come to the green carpet for this meeting. Please remind students to be seated quickly and quietly.

### Break Rotation #1

Students are divided into three groups and will rotate to take breaks. While one group is on break, the other two groups are to continue working. Remind students to check in with their boss (the Agency Executive) before leaving for break or work-related duties. Also, remind students going to break that they must go to the Bank to deposit their paychecks, open their savings accounts and eat lunch, before doing other activities. JA BizTown staff will announce the beginning and ending of each break period.



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### **Staff Meeting #2**

(10 minutes at the conclusion of Break Rotation #1)

Have the students meet with you in a group and bring their checkbooks and pencils. Please use the entire 10 minutes and these pointers to ensure you complete all necessary tasks.

#### **Prepare for the second and final break:**

Ask students to open their checkbooks and complete a new deposit ticket. (Be sure each student has not asked for more than \$2.00 in cash. Be sure students enter the net deposit, which is the bottom number on the deposit ticket, in their checkbook register. Have them add to get a new balance. Refer to the "Check It Out" poster in your business.)

Check each employee's check register to make sure he/she has opened their savings account. Any checks he/she wrote while on break should also be entered and subtracted from their balance.

Remind employees that this is their last chance to go shopping. Remind them to spend their money wisely...but to be sure to spend it since they can't take it with them. Be sure each employee knows how much money they have available.

#### **If time allows, discuss the day so far by asking the following questions:**

Are we courteous to all of our customers?

Are we doing a good job of completing the Insurance Policies and sending out the invoices?

Is each one of us doing our job?

### **Break Rotation #2**

Students are divided into three groups and will rotate to take breaks. While one group is at break, the other two groups are to continue working. Remind students to check in with their boss (the Agency Executive) before leaving for break or work-related duties. Also remind students going to break that they must go to the Bank to deposit their paychecks before going shopping.

**Businesses are officially closed when the Group C break is over.**



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### **Closing Staff Meeting and Clean-Up (20 minutes)**

Have the students bring their checkbooks to again meet with you in a group. Remember, this is the final business staff meeting of the day. The time allotted for this Closing Staff Meeting and Clean-up period is 20 minutes. All business activity is over and it is time to reflect on the day.

#### **Reflection**

- Review with the students what they felt went well and what they believe they could have done better as a business team.
- Ask the students to share some of the things that they learned today, both as part of the business team and individually.
- Ask the students to name some of the challenges they had today and what solutions they found successful.

#### **Clean-Up - Have all employees do the following:**

- Put all materials and supplies back in the original location.
- Neatly fold all uniforms and place them on top of the filing cabinet.
- Check to make sure all student Job Simulation binders and the Volunteer Manual are returned.
- Do not turn off the computers.
- Teachers may be interested in taking completed business paperwork back to school for follow-up, especially student checkbooks. Collect these items and place them back in the BizPrep Envelope and give it to a teacher.

#### **Money Collection**

- Collect all JA BizTown coins, dollar bills and any other JA BizTown re-usable student materials from students. Give them to a JA BizTown staff member when he/she comes to collect them.

### **Closing Town Meeting**

Have students wait in their business until the announcement for the Closing Town Meeting. JA BizTown staff will instruct students to sit on the green carpet for this meeting. Please remind the students to be seated quickly and quietly.

#### **Dismissal**

School personnel will dismiss the students at the end of the day.

**Thank you for your assistance today! We couldn't have managed without you!!!**