

Welcome to Your Volunteer Day in Professional Offices

We appreciate all your assistance today in making this an outstanding learning experience for the employees in U.S. Bank Wealth Management. **Please refer to this Volunteer Manual throughout parts of the day.**

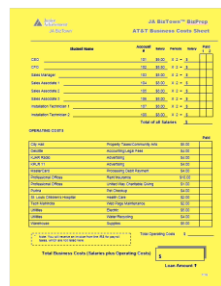
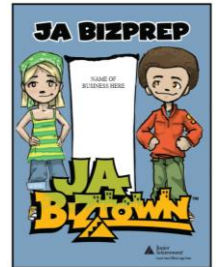
Your Day

- Professional Offices houses a number of businesses: Insurance, Accounting and Marketing.
- When the citizens arrive, they will be seated in the common area. We encourage you to listen to the orientation that they receive.
- At the end of the orientation, the employees will report to you.
- Introduce yourself.
- Please hand out neck wallets and direct them to begin their work. They should keep their checkbook, JA BizTown cash, and debit card in the neck wallet and wear them throughout the day.
- This Volunteer Guide breaks out the day into its main parts:
 - Business Start-up
 - First Work/Break Rotation (red, yellow, green)
 - Mid-Day Banking Meeting & Reminders
 - Second Work/Break Rotation (red, yellow, green)
 - Clean Up

VOLUNTEER GUIDE TO START-UP BUSINESS MEETING

During your business start-up time with the students. All employees stay in the business. **Please be sure to complete the following.**

1. Make sure that the **CEO** has the **JA BizPrep** envelope containing work that the students completed at school. They will need these pages throughout the day.
2. Ask the **CEO** for the yellow **Business Costs Sheet** located in the JA BizPrep envelope. Hand to **CFO**.



3. Tell the **CFO** to go to the computer and begin processing the loan and payroll, **following the instructions** on the computer and/or laminated sheet.
 - a. The **CFO** will take out a business loan, input all employee names into the computer, print payroll checks (for pay period one) which the **CEO** will sign. *(Must be done first thing in the morning.)*
 - b. The **CEO** will sign and hand out the first pay period checks before first break begins.
4. Explain that all workers should now read their **job tasks** either on a laminated sheet on their desk or on their computer. Instructions for the entire day are there for them.
5. Have employees begin/continue their tasks according to their job descriptions.
 - The **CEO** will:
 - distribute direct deposit forms (for second paycheck) to all employees and collect them when they are filled out.
 - will prepare the **Green** Bank bag on the desk with items listed; Loan Application, Promissory Note, and Direct Deposit Application Forms.
 - Review the Opening Speech for the Town Hall Meeting.

6. The **CPA** should read and follow instructions on their laminated sheet. They should familiarize themselves with their assignments for the business day.
7. The **Insurance Agent** reviews all instructions for Business Start-up. Prepare to process business insurance policies.
8. The **Marketing Director** should read all instructions for their job on the laminated sheet on their desk. Locate supplies needed.

GUIDE TO THE FIRST WORK/BREAK ROTATION

- All businesses are open.
- The **CEO** will take completed **GREEN** bank bag to Central Bank
- The **CEO** will follow instructions to create and send invoices to all businesses for insurance policies.
- The **CFO** will pay bills in the Accounts Payable section on their computer.
- All other workers begin their job.
- The **CPA** will process bills for accounting services to businesses. When finished, the CPA will visit BizTown businesses to perform a Business Audit using the CPA Audit Spreadsheet.
- The **Insurance Agent** will explain what insurance is and why businesses need it. They will help businesses choose the right type of insurance coverage. Begin to review applications and turn into CEO for billing.
- The **Marketing Director** will create advertisements and flyers to promote each business. Use the businesses slogans to attract customers. Hang advertisements at each business and around town.

Mid-Day Banking Meeting

All Citizens will be called to a meeting after all first break rotations are complete.

1. **Listen** for JA staff to direct all citizens to sit in front of the gazebo. Citizens should bring their personal checkbooks and a pencil.
2. After the meeting, citizens will return to their businesses and get ready for their final break.

Please Remind Students:

- **To eat their lunch** in The JA Cafe. (You may eat during the second break with your student as well.)
- **Spend** their money, it will be their final opportunity to shop.
- **Return to work** at the end of their break.

GUIDE TO THE SECOND WORK/BREAK ROTATION

- The **CEO** will continue to sign business checks and assist other jobs that are on break.
- The **CFO** will continue to pay bills and make payments toward their Business Loan.
- **CFO** will prepare the Blue Business Profit/Loss Report at the end of the day (during the last green break) to be read at the Closing Town Meeting.
- The **CPA** will continue to perform Business Audits and collect payment from businesses. Give check payments to the **CFO**.
- The **Insurance Agent** will collect payments for insurance and give to **CFO**.
- The **Marketing Director** will collect advertisements and flyers from around town during final **green** break and recycle.

END OF DAY – CLEAN UP

- Employees should make their workstations look like they did at the beginning of the day.
- The Employee Manuals remain at Junior Achievement BizTown®. Please collect all **job neck wallets**, empty them, and return to their original place.
- CFO should remove all papers from folders and place in the trash can.
- Any papers that are written on should be placed in trash can. Laminated sheets should be cleaned using wipes.
- All employee manuals are placed back in appropriate black bins.
- Pencils, scissors and dry erase markers should be placed in holders.

We will e-mail a survey so you may provide feedback to us about your day.

If you would like information on how to support our Junior Achievement Programs, please see a staff member. We are always looking for volunteers or a donation to sponsor a student at Junior Achievement BizTown® for as little as \$25.00.

Thank you for your help today! We can't do it without you!