



The Mercantile Volunteer's Role

IMPORTANT POINTS TO REMEMBER

- Provide guidance and assistance to students.
- Use the Staff Meeting Script in this Manual.
- All directions in the Volunteer Manual Staff Meeting Script can be read to students word for word.
- Make sure students pay attention to announcements and break schedules.
- Remind students to use time wisely during their breaks.
- Assist students as needed, but remember, it is their job to get everything done. Please do not tell them what to do.
- It is OK if students do not do everything right. They will learn from those mistakes.
- It is OK if the business does not pay off their loan. It is one of the goals for the day, but not the only goal.

LOCATION OF IMPORTANT INFORMATION

- Complete student job responsibilities are found in the Simulation Folders. Using the checklist in this manual, refer students to their own manuals to get detailed directions for tasks.
- Unanswerable questions or concerns should be referred to a JA BizTown staff member.

PERSONAL INFORMATION

- Take your breaks as needed.
- Please wear your nametag.
- At the end of the day, return the Volunteer Manuals and Student Simulation Folders to where you found them at the beginning of the day.
- This is a smoke-free facility. Please do not smoke on the property.

STUDENT EXPECTATIONS

- Students must remain inside the *JA BizTown* area for the entire day.
- Food and drinks must remain in the eating area. This also applies to adults.
- No gum is allowed in *JA BizTown*.

ITEMS INCLUDED IN UPS INVENTORY

- Students should confirm that all items listed on the UPS inventory sheet are in the order.
- Additional items needed for business operation will be provided by other businesses (forms, bank bags, etc.).



The Mercantile Helpful Hints

Thank you for volunteering to assist the students at *JA BizTown*. The job you have here today is very important. Please read and use the helpful hints listed below as you work with this business. If you have any questions or concerns, please ask a *JA BizTown* staff member. As students ask for help during the day, remind them to check their simulation guide for their next steps.

1. The Mercantile will borrow money from Umpqua Bank. After the National Anthem, the Store Manager will take the **Loan Application** and **Promissory Note** (located in their BizPrep Packet) to, Umpqua Bank and The UPS Store will deliver your supplies.
2. The Store Manager should sign all checks. If they are not available, the CFO may sign in their absence. The CFO should only pay bills as they receive bills from other businesses.
3. Instruct employees to follow all equipment directions carefully and ask for assistance from the *JA BizTown* staff if anything is unclear or not working. **Don't try to fix it yourself!**
4. Only what comes from The UPS Store is for sale today. The items in the business when the students arrive is for stocking the shelves. They should set up their business after the staff meeting.
5. As students begin to **price products**, give guidance and reminders through the following pricing techniques:
 - Know the amount of money needed, with interest, to pay off the Umpqua Bank loan (amount is in the BizPrep packet and on the CFO's computer).
 - Nothing should be priced under the suggested retail price located on the inventory sheet from UPS.
 - Do not open for business until pricing is completed.
 - Do not allow students to lower prices at any time.
6. Once they have decided on the names for the products, the students will need to set up the POS (Point of Sale) Tablet. The *JA BizTown* Staff will show you how this works during your morning orientation. There is also detailed instructions in the Sales Managers manuals. Assist the students if needed.
7. The students also need to create a **Pricing Sheet**. They should grab a blank piece of paper from the printer to create this. They should list the name of each item and the price. Once it is completed they should display the pricing sheet in the sign holder on the display case
8. **The Mercantile only accepts debit card for purchase of items.**
9. Encourage students to use creative advertising to draw customers into their business.

10. When the Sales Manager goes on break, if another Sales Manager is not available, the Store Manager should take over to assist customers.
11. At the end of the day, be certain that all Student and Volunteer Manuals remain in the business.



The Mercantile Volunteer Facilitator Directions

START-UP TIME

(45 minutes)

- Start with 20 minutes of uninterrupted time for Staff Meeting #1. No Student should leave the business during this time unless they need to use the restroom. This meeting allows time for the discussion listed below and for students to read their own Simulation Manuals.
- At the end of these 20 minutes, the National Anthem will be played. At this time, only students whose jobs take them out into *JA BizTown* may begin to perform their tasks. All other employees will remain in their business to continue with Start-Up tasks.
- At the end of the 45 minute start-up period, a *JA BizTown* staff member will call all employees to the front of their business for the Opening Town Meeting.

Staff Meeting #1

1. **Gather your team members into a small group. This is a time when you take charge of the group. Introduce yourself, greet the students, and review employee responsibilities. The CFO should already be at their desk working. As you identify which students are doing the different jobs, be sure to pass out the employee lanyards to each employee. Their job title will be listed on the lanyard. Their break color is also on the lanyard. They should wear the lanyard all day.**

ASK: *Who is the Store Manager?*

SAY: *You are responsible for the smooth operation of The Mercantile. You will make a speech at the Opening Town Hall meeting to let citizens know what The Mercantile has to offer. Be certain all employees are familiar with their responsibilities and are courteous to customers.*

ASK: *Who are the Sales Managers?*

SAY: *You are responsible for receiving supplies from The UPS Store, working with the Store Manager setting up the Point of Sale (POS) tablet. Create attractive product displays and assist customers with sales. Be certain to provide customers with excellent and courteous service.*

SAY: *Each of you need to read your Simulation Manual frequently to make sure you are handling all of your responsibilities correctly. After the Opening Town Meeting, our breaks will start. Let's make sure our paperwork will be ready for making personal deposits at Umpqua Bank. Please find your first deposit ticket in your checkbook. Is it completed? Let's check to make sure that you have entered the correct amount on your deposit ticket. (Refer to the Gross/Net Pay Chart following.)*



Job Title	Gross Pay	Net Pay
Store Manager	\$9.00	\$8.82
CFO	\$8.50	\$8.33
Sales Manager	\$8.00	\$7.84

ASK: *Have you decided how much cash you will be requesting at the bank?*
(Be sure each student has completely filled out a deposit ticket and has not asked for more than \$2.00 in cash. Remember, cash can only be used for purchases at Chick-Fil-A or for personal philanthropy donations at the Water Partners.)

SAY: *Has your first deposit been entered into your checkbook register?*
(Students have been taught to use a double entry system for recording entries in the checkbook register. Be sure students enter the net deposit, which is the bottom number on the deposit ticket, in the deposit column as well as in the balance column of their checkbook register. Have them add to get a new balance.)

SAY: *Next, we need to be sure you are ready to open your savings account when you go to Umpqua Bank. Have you written your \$1.50 check to Umpqua Bank for opening your savings account and recorded your check in the payment/debit column and in the balance column? After you have completed that, subtract and put the answer on the gray line.*

SAY: *When it's time for your break, you will get your paycheck from the CFO and endorse it. Then you'll need to take your paycheck, your completed deposit ticket, your \$1.50 check written to Umpqua Bank, and your completed checkbook register to Umpqua Bank.*

SAY: *Now, before each of you begin reading your Simulation Manual, let's quickly talk about our business goals for the day. What do you think some of our goals should be?*
(Students should discuss teamwork, customer service, cooperation, repayment of Umpqua Bank loan, and making a profit.)

SAY: *Now you need to go to your work area, read your Simulation Manual, become familiar with your job responsibilities, and begin to work. Remember, you may not leave our business. Once the National Anthem plays, the employees who need to work outside of the business can leave.*

Opening Town Meeting

JA BizTown staff will instruct students to sit in front of their business. Please remind students to be seated quickly and quietly. JA Staff will adjust students as needed so that all businesses can see.

Break Rotation #1

Students are divided into three groups and will rotate to take breaks. Refer to your break schedule on the bulletin board and employee lanyards to see which rotation students are on. While one group is at break, the other two groups should be working. Remind students to check with their



boss before leaving for break or work-related duties. Also, remind students starting their break to eat lunch and go to Umpqua Bank to deposit their paychecks.

Staff Meeting # 2

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

Have the students bring their checkbooks and pencils to meet with you in a group. This is again a time when you must take charge of the group. Please use the entire 10 minutes to discuss the scripted points below to assure that you complete all necessary tasks.

1. Prepare for second and final break:

SAY: Did anyone make any purchases on the last break? Did you record the checks you wrote in your checkbook register?

(Compare registers with purchased items to be certain that employees are recording each purchase. If not, bring the registers up-to-date.)

SAY: Remember your 2nd paycheck is being directly deposited into your checking account. If you are not here already, please turn to your register in your checkbook and enter your 2nd paycheck amount. (Either \$8.82, \$8.33 or \$7.84). Add this amount to your balance.

*SAY: Does anyone want more cash for your 2nd break? If you do, you will need to write a check out to **cash**. Turn to the next check in your checkbook and fill it out. Remember you cannot take out more than \$2.00 in cash.*

SAY: Once you have completed the check for cash, you will need to subtract that dollar amount from your balance. You should now have your new balance.

SAY: This next break is your last chance to go shopping, so use your time carefully. Spend your money wisely, but spend it before leaving JA BizTown; you cannot take it with you. (Be sure students know their break color and how much money they need to spend during this final break.)

2. Discuss the first production period by asking the following questions:

ASK: Are we courteous to all of our customers?

ASK: Are we creating attractive displays to advertise our products?

ASK: Do our products seem to be priced properly to attract customers?

Break Rotation #2

Remind students to check in with their boss before leaving for break or work-related duties. Also, remind students starting their break that they must first go to Umpqua Bank to get cash back if they want cash to spend.



Closing Staff Meeting and Clean Up

(10 minutes)

Have the students bring their checkbooks and pencils to again meet with you in a group. Remember, this is the final business staff meeting of the day. Please use this entire period to clean up and hold the Closing Staff Meeting in the manner most suitable for your business. All business production is over, and it is time to reflect on the day and discuss whether the business was successful.

1. Reflection

ASK: *How many of you remember what our business goal was today at JA BizTown?*
(Review with students that paying off the business bank loan was a business measure of success for the day.)

ASK: *Did we meet that business goal?*
(Ask the CFO to give a brief report about loan repayment if necessary. If the Umpqua Bank loan was repaid, discuss how that repayment spelled success and review the term “profit.” If the Umpqua Bank loan was not repaid, discuss why and what could have been done differently to ensure business success.)

ASK: *What are some things that you learned today about how a business becomes successful?*
(Briefly review and discuss how the success of a business relies on teamwork, individual job responsibility, proper pricing, advertising, etc.)

ASK: *How many of you feel that you were personally successful today? Why or why not?*
(Discuss the importance of being an effective business team member, and help them to recall and review the importance of circular flow.)

SAY: *Name some of the challenges/benefits of keeping a personal checkbook register.*

ASK: *Why is it important that we each lend a hand to clean up our JA BizTown business before we attend the Closing Town Meeting?*
(Discuss what needs to be done to effectively and safely clean up the business and oversee clean-up completion by the students.)

2. Clean-Up

- Put all supplies and materials, including the Simulation Manuals and Volunteer Manuals, back in the original location. If you have extra inventory, place it back in the UPS supply box for *JA BizTown* staff to pick up later.
- Pick up everything on the floor.
- **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 into the manila envelope the students brought from school and give it to the CEO to take back to school.



3. Money Collection

- Collect all *JA BizTown* coins, dollar bills, employee lanyards, bank bags and any other *JA BizTown* reusable materials from students and adults. Leave them in your business.

SAY: When you feel our business is cleaned to our best, please gather your personal materials and stand by the doorway until we are called by the JA BizTown staff to attend the Closing Town Meeting.

(Be certain that students leave no personal items behind. Replace all uniforms or materials belonging to *JA BizTown*.)

Closing Town Meeting

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

Dismissal

Thank you for your assistance today. We couldn't have operated without you!!!



The Mercantile Volunteer Checklist

Before National Anthem

- ✧ Hold 1st Staff Meeting
- ✧ All students need to read their simulation guides
- ✧ CFO enters loan amount and all employees in the computer, completes all payroll checks, and submits order to The UPS Store
- ✧ Store Manager signs all paychecks and distributes them to all team members

After National Anthem - before Opening Town Hall Meeting

- ✧ Store Manager
 - Take loan papers to Umpqua Bank
 - Price Inventory
 - Practice or assign Opening Town Hall Meeting Speech
- ✧ CFO
 - Pays bills as they are received
- ✧ Sales Manager
 - Accepts The UPS Store order and divide stock into 3 break bins
 - Price inventory
 - Set-up Point-of-Sale (POS) tablet

During 1st break rotation

- ✧ Store Manager
 - Pick up health vouchers from Virginia Garcia
 - Greet customers and make sales
- ✧ CFO
 - Pays bills as they are received
 - Repay loan as purchases are made
- ✧ Sales Manager
 - Assist customers as they purchase items

During 2nd Staff Meeting

- ✧ CFO activates direct deposit for second payroll check
- ✧ Help students complete second payroll deposit and write check for Cash (if needed)

During 2nd break rotation

- ✧ Store Manager
 - Greet customers and make sales
 - Make sure CFO is paying back loan
- ✧ CFO
 - Pays bills as they are received
 - Repay loan as purchases are made
- ✧ Sales Manager
 - Assist customers as they purchase items

After 2nd set of breaks – before Closing Town Hall Meeting

- ✧ Hold 3rd & final staff meeting
- ✧ CFO should make final loan repayment (if needed)
- ✧ Collect any unused cash or coins and employee badges from students
- ✧ Return all simulation manuals to black holder
- ✧ Collect personal belongings, and attend Closing Town Hall Meeting when announced