



JA Finance Park – Virtual Volunteer Guide

JA Finance Park combines classroom or self-guided learning with a hands-on financial simulation experience. Students explore important topics to develop their personal money management skills, acquire personal finance knowledge, and prepare for financial decisions and challenges in their adult lives. The program helps students make the connection between what they learn in school and the real world. Students can put their learning to life through the JA Finance Park simulation. The topics below are from the curriculum’s extension lessons, which give students the opportunity to take a deeper dive into financial topics beyond the regular curriculum.

Volunteer Role

JA Finance Park virtual volunteers will assemble with co-workers to form an Expert Team (2-4 panelists) to create a 7-10-minute prerecorded video using your laptop, tablet, or smartphone. Expert team will select **one topic** within one of the four JA Finance Park units (e.g.: “Medicare”). Experts will share their experience and professional advice on the selected topic using talking points (pages 4-5). The video is viewed by students to complement their JA Finance Park lessons.

Pre-recorded Video

Expert Team Roundtable – Volunteer Need: **2-4 panelists** (7-10-minute presentation)

Expert Team will select **one topic** within one of the four JA Finance Park units. Each member of the team will choose one or more talking points to discuss. Team addresses all talking points listed in the topic presentation outline. Select a Team Lead, who will be responsible for:

- ★ Scheduling the planning meeting and rehearsal with the team prior to recording
- ★ Leading presentation welcome and prompting closing/wrap up and monitoring recording time
- ★ Scheduling 1hr virtual training with JA staff (optional)

Time Commitment

Approx. 1-2 hour(s) - includes prep, filming, and uploading your file to Dropbox.

- Additional 1 hour of (optional) training

✓ Volunteer Steps to Complete

- All Volunteers must complete a [JA Volunteer Registration Form](#)
- **INSTRUCTIONS** when completing the registration form:
 - ! Please select under **Volunteer Engagement** - *Virtual Recorded*
 - ! In the **JA representative** you are currently working with **box** – *type JA Finance Park*
- Film video and upload it to a [secure Dropbox folder](#) (further instructions below)
 - You **do not** need a Dropbox account to upload your video to this folder & JA will review and brand
 - Video will be shared with JA Finance Park teachers & students
- **Review** information on **pages 2-6**
 - ★ Preparing the Presentation – page 2
 - ★ Presentation Flow and Presentation Outline – page 3
 - ★ JA Finance Park Unit talking-points – page 4-5
 - ★ Creating and submitting your video – page 6

Preparing the Presentation

Logistics

- Many platforms (WebEx, Teams, Google Meet, Zoom, etc.) have the record option
- Recommend **business attire**
 - Avoid patterns and high contrast pinstripes
 - Blues and natural tones or pastel colors
- Team Lead → schedule a pre-call/rehearsal prior to the video recording date
 - Pre-call – choose unit, assign roles, and discuss presentation content and flow
 - Rehearsal – practice the presentation (consider recording this to see how it looks on camera)
 - **During** pre-call/rehearsal Team members:
 - Choose JA Finance Park unit and determine which team member will discuss which talking point(s)
 - Coordinate and schedule recording day/time, record and upload the final presentation
 - *Optional* - establish if team will use visual aids.
 - If utilizing screen share visual aids, decide who will screen share during the recording

Presentation Flow

- ✧ The key to a smooth presentation is volunteers taking time to practice presenting their content on their own
- ✧ Produce a script to use as a guide (optional) – check out a [video series](#) on benefits & how to tips
 - If using a script/notes during recording, place behind the camera to ensure level eye-contact
- ✧ Before video recording session stretch out your face and mouth, yawn with noise (helps tremendously)
- ✧ **Share Examples**
 - Students learn best when they **connect** with the material through stories and examples
 - Share stories and give detailed examples to illustrate your talking-points
- ✧ **Visual Aids**
 - Students learn best when they can both **hear** and **see** the material
 - Prepare visual aids to enhance your presentation, such as cards with key-terms written on them, physical items that represent what you are discussing, or using screen share to display images
- ✧ **Speaker Energy**
 - Use facial expressions, hand gestures, vary the pace of delivery and emphasis
 - Create ‘virtual body language’ – be animated, inject your personality
 - Stand or sit up straight and gesture like you are talking to an audience in person
 - Be conversational and use the word YOU as if you are speaking to one person

Presentation Outline

Welcome and Introduction

- Team Lead greets panelists and introduces their company
 - ★ Share the organization that the team works for, and what product(s)/service(s) the company provides
- **Volunteer Introduction** – each volunteer expert takes 30 sec.
 - ★ Name, pronouns
 - ★ Role at the company

JA Finance Park - Team Presentation

- Expert Team select **ONE** topic for recorded presentation. JA Finance Park Units:
 1. **Social Security**
 2. **Medicare**
 3. **Sales Tax**
 4. **FAFSA**
 5. **Understanding Stock Quotes**
 6. **Leasing or Buying a Car**
 7. **Identity Theft**
 8. **Personal Budget**
 9. **Paying for Postsecondary Education**

Closing & Wrap-Up – all volunteers engage in closing

- Provide words of encouragement and reassurance to the students, especially in these uncertain times
- Celebrate their resilience and perseverance
- Team Lead says goodbye

JA Finance Park Units

Unit #1 | Income – Talking Points

Social Security:

- Introduce and explain Social Security on a fundamental level
 - Share with students the history of Social Security, and how it began
 - Discuss what the Federal Insurance Contributions Act (FICA) is
 - Share with students how Social Security is funded, and how it impacts them as tax paying citizens
 - Talk about what the benefits are of Social Security, and how it may impact them personally

Interactive Visual Options - Paystubs, employee benefit models, historic data, etc.

Medicare:

- Introduce and explain Medicare on a fundamental level
 - Share with students the history of Medicare, and how it began
 - Discuss what the Federal Insurance Contributions Act (FICA) is
 - Share with students how Medicare is funded, and how it impacts them as tax paying citizens
 - Talk about what the benefits are of Medicare, and how are those benefits relevant to them as individuals
 - Share if you have a relevant personal story associated with Medicare

Interactive Visual Options - Benefit graphics, Medicare vs Medicaid, Medicare card, etc.

Sales Tax:

- Introduce a high-level summary of what Sales Tax is
 - Share with students where our money goes when we pay sales taxes
 - Share with students what items are taxed, and not taxed in Minnesota, and why
 - Share with students how to calculate sales tax
 - Share with students a personal story of yours about sales tax, i.e.: a time you were surprised by the amount, do you always calculate it before buying items, etc.

Interactive Visual Options – Sales receipt, examples of taxable and non-taxable items, etc.

Unit #2 | Saving, Investing, and Risk Management - Talking Points

FAFSA:

- Introduce what the Free Application of Federal Student Aid is (FAFSA)
 - Share with students why it is important to apply for the FAFSA, and why they may want additional aid
 - Share with students a high-level breakdown of applying for FAFSA, including when, how, and any tips
 - What happens after you complete the FAFSA, how long does it cover you, and when should you reapply
 - What are some things you wish you knew about Financial Aid when you applied for college

Interactive Visual Options – The FAFSA website, example of the cost of attending college, etc.

Understanding Stock Quotes:

- Introduce on a fundamental level what a Stock Quote is
 - Share with students what it tells you about the stock, and why it is important
 - Share with students how to read a stock quote
 - Previous close, high, low, volume, change %, 52-week high, and 52-week low
 - Share if you have a relevant story associate with stocks or stock quotes

Interactive Visual Options – An actual stock quote, etc.

Unit #3 | Debit and Credit – Talking Points

Leasing or Buying a Car:

- Introduce a high-level explanation of leasing versus buying a vehicle
 - Share with students the advantages and disadvantages of buying a car
 - Share with students the advantages and disadvantages of leasing a car
 - Discuss leasing vs buying options, and situations where those options may be viable
 - Provide tips on searching, realistic budgeting, and negotiations
 - Share your story regarding buying and leasing, i.e.: the successes and pitfalls

*****Interactive Visual Options** – A chart to show a real-life example of comparing buying vs. leasing, etc.

Identity Theft:

- Introduce Identify Theft on a fundamental level
 - Share with students common scams young adults encounter, and how to protect yourself
 - Share with students what to do if your identity or financial information is compromised
 - Provide tips on how to avoid identity theft
 - Share if you or someone you know have a relevant story associated with identity theft

*****Interactive Visual Options** – Sample of a strong password, example of an email scam, dialogue of a scam call, etc.***

Unit #4 | Budget – Talking Points

Personal Budget:

- Introduce the lesson by reviewing what a budget is and why it is important (*NOTE: students will have already learned the basics of what a budget is with their teacher*)
 - Share with students the key factors to consider when making a budget
 - Share with students the short term and long-term benefits of setting budgeting goals and staying on track
 - Share with students tools that will help to stay on track with budget and savings goals
 - Share if you have a relevant story associated with personal budgeting, especially if you have a story from when you were a teenager

*****Interactive Visual Options** – Apps like Mint or Pocket smith, expense calculators, budget tools from banks, etc.***

Paying for Postsecondary Education:

- Introduce the lesson by sharing the realistic expenses associated with a Postsecondary Education
 - Discuss why it is important to have a plan to pay for college, technical, or trade school
 - Share with students what that plan should look like, i.e. - talking to your guardian, deadlines, etc.
 - Share with students the many ways to pay for a postsecondary education
 - FASFA, Grants, Loans, Scholarships, Work-Study
 - Share if you have a relevant story about your educational journey and financial strategies while attaining an education
 - Share if you have any tips for being financially prepared for attaining a postsecondary education

*****Interactive Visual Options** – Sites to apply for scholarships and loans, etc.***

Recording Your Video

Setting the “Stage”

- Find a quiet location, without background noise from television, family members, etc.
- Keep the background behind you neutral, away from distracting elements.
- Use ample lighting to make sure you can clearly be seen. Your lighting source should come from in front of you and not behind you. Please experiment with lighting first before recording. View this short [video](#) on lighting and camera angle.

Video Framework

- Create video by using the camera on your device or recording on a virtual sharing platform. See the following links for resources on how to record on your preferred platform:
 - Zoom: [How to record to local device](#); [How to record to the Cloud](#); [Choosing a recording layout](#)
 - Microsoft Teams: [How to record a meeting in Teams](#)
 - WebEx: [Recording and Downloading your WebEx Meeting](#)
 - Google Meet: [Record a video meeting](#)
- Feel free to use props, tools, or pictures to help explain your work.
- Maintain eye contact with the camera as much as possible.

Ready, Set, Action!

All that is required is a laptop (recommended), smart phone, or tablet. Use your device’s video function to record your introduction. Below are best practices to help get you started.

Laptop

- Open your camera function, start your video.
- Start virtual meeting using the screen sharing platform – press **record** on toolbar.
- Utilize a screen sharing function if you would like to share photos or files in your intro.
- Once you end your recording, you will be able to download and save the video file.

Smart phone or tablet:

- Stabilize device to avoid shaking. Use tripod, stand, or have someone help you film the video.
- If a person is filming you, they should sit, or rest their elbows on a flat surface to be a “human-tri-pod”
- Record the video in landscape mode (also known as horizontal or sideways).
- Do not use a flash. No flash needed if you have good lighting.
- When using a phone - make sure that the person who’s filming does not cover up the microphone near the charging port with their hand.
- Export your video in one of the following formats: MP4, MOV, WAV, ProRes, MXF, AIF, M4A, AAC, PSD

That’s a Wrap! – Time to Submit Your Video

Once you have finalized your video, please upload the file to JAUM’s Dropbox via this [link](#)

IMPORTANT – please **name** your file using the instructions below:

Team volunteer recording FILE NAMING: First Name of each team member - Company – JA Finance Park Topic

*Example: *John – Judy – Sam - Lauren_Junior Achievement – JA Finance Park - FAFSA.*

Thank You!!