

Leaders Institute BizPrep

Welcome Letter

Business CEO:

We are looking forward to your school's visit to *JA BizTown* and hope that you and your team are as well. We know you are learning a lot about operating your own business and handling your own finances. Before long, you will be able to put your knowledge to work and, hopefully, see success for both yourself and your business.

You will find many important papers in this BizPrep Packet. All pages must be completed before coming to *JA BizTown* and must be brought with you on the day of your onsite visit. There are also several tasks to be completed in preparation for your visit. **Please use the checklist below to assure that all paperwork and tasks are completed and checked for accuracy.**

____ Business Cost Sheet

____ Loan Application

____ Newspaper Ad

____ Radio Ad

____ Philanthropy Pledge Sheet

____ Employee Checkbooks*

____ Employee Name Tags (optional)

**Completed checkbooks should be placed in the BizPrep envelope with the other paperwork.*

Your signature at the bottom of this page indicates that your business team is ready for business. Thank you for handling this responsibility!

We look forward to seeing you soon,



Lena Yarian
President, JA of Northern Indiana

Our business has prepared each of the
above items:

CEO'S Signature

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Business Cost Sheet

SALARIES

Student Name (First and Last Name)	Account #	Break	Salary	Periods	Total Salary
CEO _____	187	Yellow	\$9.00	X 2 = _____	
CFO _____	188	Red	\$8.50	X 2 = _____	
Facilitator 1 _____	189	Green	\$8.00	X 2 = _____	
Facilitator 2 _____	190	Yellow	\$8.00	X 2 = _____	
Investment Officer _____	191	Yellow	\$8.00	X 2 = _____	
Leadership Coach1 _____	192	Red	\$8.00	X 2 = _____	
Leadership Coach 2 _____	193	Green	\$8.00	X 2 = _____	

NOTE: The above assigned account number MUST be the same account number written on the front of the citizen checkbook.

Section A: Total Salaries \$ _____

OPERATING COSTS

Advertising	(\$6 to Newspaper, \$6 to Broadcast)	\$12.00
Healthcare	(\$5 to Healthcare)	\$5.00
Professional Services	(\$12 to Professional Office) - Building Lease, Insurance, Accounting, Commercial Auto Lease	\$12.00
Philanthropy	(\$2 to Science & Industry)	\$2.00
Staff Enrichment	(\$4 to Sports Marketing, Entertainment, <u>or</u> Retail)	\$4.00
Supplies	(\$7 to Supply Center) - First Supply Order \$5, Supply Reorders up to \$2	\$7.00
Utilities	(\$5 to Utility Company)	\$5.00

Section B: Total Operating Costs \$ _____

TOTAL BUSINESS COSTS:
(Salaries plus Operating Costs)

\$ **A + B**

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Loan Application

BUSINESS INFORMATION

Business name: _____

Do you provide a good or a service? _____

*Use the information on the **Business Cost Sheet** to complete this application.*

EMPLOYEE INFORMATION

Number of employees: _____

Total of All Salaries: \$_____ Line 1

Transfer from Business Cost Sheet: Section A

OPERATING COSTS INFORMATION

Total Operating Costs: \$_____ Line 2

Transfer from Business Cost Sheet: Section B

TOTAL BUSINESS COSTS

Total Business Costs: \$_____ Line 3
Line 1 + Line 2

TOTAL INTEREST AMOUNT

(Multiply 5% times the **Total Business Costs**)

\$_____ Line 4
Line 3 x .05

TOTAL AMOUNT DUE

(Total Business Cost + Total Interest Amount)

\$_____ Line 5
Line 3 + Line 4

As a representative of the above named business, I agree to repay the Total Amount Due, which includes both the loan amount requested plus interest. I certify that the above information is correct to the best of my knowledge.

(CEO's Signature)

TO BE SIGNED BY BANK CEO AT JA BIZTOWN

Circle One: Approved Denied

(Bank CEO's Signature)

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Newspaper Advertisement

Your business needs to create a business advertisement for the *JA BizTown* newspaper. On the day of the visit, the newspaper staff will collect this advertisement from your business. The newspaper editor may need to edit your ad to fit into the newspaper.

Using no more than **10-15 words**, write a descriptive advertisement for your business. Be creative!

Note: You may not know what products/services you are providing until you arrive at *JA BizTown*. Take this opportunity to advertise the quality characteristics of your business. Let people know what a great staff/business you will be running so they know why they should visit your business.

NEWSPAPER EDITOR:

Type this advertisement on
Layout Page 2.

_____ Completed

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Radio Advertisement

Create a 30-second radio commercial for your business. On the day of the visit, the Broadcast staff will collect this advertisement from your business so that it can be read on air by the DJ.

Time: 30 seconds (approximately 110 words)

Note: You may not know what products/services you are providing until you arrive at *JA BizTown*. Take this opportunity to advertise the quality characteristics of your business. Let people know what a great staff/business you will be running so they know why they should visit your business.

BROADCAST DJ:

_____ Read On Air

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Philanthropy Pledge

Good citizens are people who accept their share of responsibility for making their community a better place. Citizens can help by donating their time (volunteering), talent (skills), and treasure (money) to charitable organizations.

JA BizTown citizens have the opportunity to give back as individuals and as a business group to a worthy JA BizTown non-profit organization. On the day of the visit, the Non-Profit Director will collect this pledge sheet and invoice your business for \$2.00 in financial support.

PHILANTHROPY PLEDGE

(Business Name)

***My employees are aware of the mission of
non-profit organizations and their role in the community.
Our business pledges \$2.00 to support a non-profit organization.***

CEO's Signature:

Employees' Signatures:

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Business Overview

A company designed to identify and develop emerging leaders within the community.

<p>CEO</p> <ol style="list-style-type: none"> 1. Submits Loan Application to bank. 2. Oversees business operations and makes business decisions. 3. Opens Utility account. 4. Distributes business supplies. 5. Prepares and sends Leadership Development invoices. 6. Signs Insurance Policy and Lease Agreement. 7. Prepares and gives speech at the Opening Town Meeting, if time permits. 	<p>CFO</p> <ol style="list-style-type: none"> 1. Place supply order and reorder, if needed. 2. Submits online request for business loan. 3. Inputs employee payroll information. 4. Processes business payroll. 5. Prepares direct deposit enrollment paperwork. 6. Completes Loan Promissory Note. 7. Makes business expense payments. 8. Submits business deposits. 9. Makes business loan payments and tracks loan payoff progress.
<p>FACILITATOR</p> <ol style="list-style-type: none"> 1. Becomes familiar with the leadership activity and how it functions. 2. Sets up POS system for sales. 3. Prepares leadership experience for customers. 4. Greets customers and conducts short briefings to explain the leadership experience objectives. 5. Resets leadership experience to accommodate the next customers. 	<p>INVESTMENT OFFICER</p> <ol style="list-style-type: none"> 1. Establishes relationships with businesses leaders. 2. Identifies business investment opportunities and distributes Investment Application paperwork. 3. Selects investment winner based on submitted applications . 4. Makes investment check presentation to chosen business leader.
<p>LEADERSHIP COACH</p> <ol style="list-style-type: none"> 1. Prepares and distributes Leadership Discovery forms to businesses. 2. Collects nominations for emerging leaders within the community. 3. Prepares and delivers leadership certificates. 4. Assists with leadership experience. 	