

Training for the future
YMCA Training Inc.

Developed in partnership with
the Federal Reserve Bank of Boston

JK Distributors, Inc.

- Associated Buyers Corporation
- Hub Suppliers
- TREMONT STREET COOPERATIVE BANK

JK Distributors Simulation Facilitator's Guide Extract

Table of Contents

Background and Objective	4
Overview	5
Implementation Tasks	6
Phase I: Initial Set-up and Installation	7
Checklist for Phase I.....	7
Obtain the Website	7
Modify the Application Database.....	8
Configure Local Student and Staff Shared Drives	8
Copy Files to Your Shared Drives.....	8
Set Up the Reserved Simulation Email Accounts and Facilitator Accounts.....	9
Plan the Simulation Physical Workspace	10
Phase II: Preparation	13
Checklist for Phase II	13
Refresh the Database.....	13
Refresh Shared Drive Files	13
Prepare Email Accounts	14
Preparing Website Accounts.....	16
Make First Entries in the Website Calendar and Scroller	18
Adjust Position Duties Summary, Simulation Calendar.....	20
Phase III: Simulation	21
Checklist for Phase III	21
Conduct Overview/Intro Session.....	22
Screen and Hire Applicants	23
Announce Positions.....	25
Conduct Initial Department Meetings	26
Hold First Managers Meeting	27
Set Up Workspace	28
Initialize the Intro Session Database	28
Conduct the Intro Session.....	29
Refresh the Database, Shared Files, and Initial Paper Transactions.....	30
Prepare Ongoing Orders (paper and phone).....	31

Support Daily Operations	32
Get Summary of Department Work	39
Phase IV: Wrap-up	40
Checklist for Phase IV	40
Announce International Potluck Celebration	40
Introduce Presentations Guidelines.....	40
Prepare Department Reports.....	41
Conduct 360 Evaluations.....	41
Facilitate Students' Closing Presentations and Learnings.....	41
Hold International Potluck Celebration	42
Tear Down Workspace	42
Appendix A: Contents of the Shared Drives.....	43
Preparation.....	43
Overview.....	43
Choosing Positions	43
Procedures, Meetings	43
Office Set-Up	44
Orientation (and practicing with the "Intro" session)	44
Supporting Daily Operations.....	44
Evaluation	44
Wrap-up	45
JKD General Manager's Office	45
JKD Sales Department.....	45
JKD Shipping & Receiving Department.....	46
JKD Accounting Department	46
ABC	46
HUB	47
TSCB	47
Appendix B. Paper Files.....	48
Appendix C. Job Positions Summary.....	49
Appendix D. JKD Time.....	50

JK Distributors, Inc. Simulation

Background and Objective

The JK Distributors simulation is a web-based application developed by the Federal Reserve Bank of Boston, in partnership with the YMCA Training, Inc.

The objective of the application is to provide a workplace simulation approach that students use to strengthen both hard and soft job skills, and to help them obtain employment.

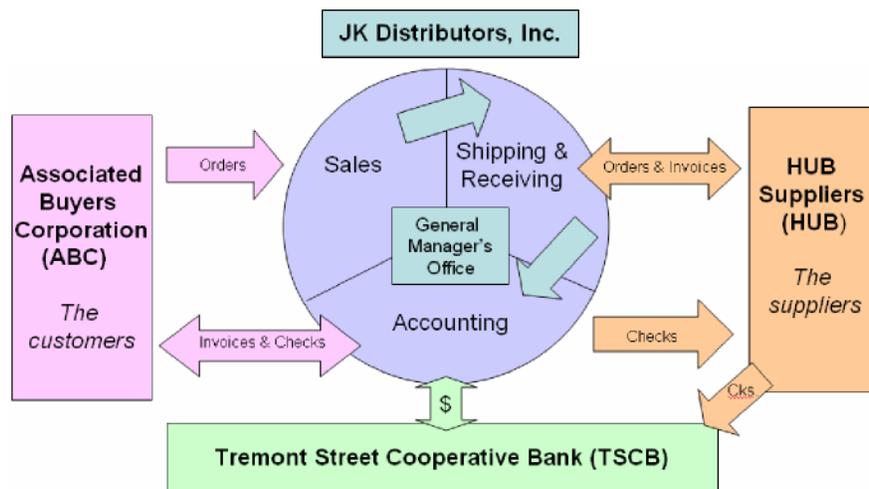
To be successful in this simulation, participants need the following skills:

- Keyboarding and familiarity with special computer keys, such as Ctrl, Alt, Delete, and Insert
- Ability to open a website and navigate within and between its pages
- Ability to open and move between several files and sites at the same time
- Familiarity with an email program, including opening and replying to incoming emails, and creating and sending new emails
- Experience with Microsoft Word and Excel, including opening, updating, and saving existing files
- Ability to sort information within a Word table and an Excel spreadsheet
- Ability to follow written step-by-step instructions
- Ability to follow manager's directions and to work with others of differing personalities and skill levels

Overview

The simulation involves a flow of transactions among four companies: JKD Distributors, Associated Buyers Corporation, Hub Suppliers, and Tremont Street Cooperative Bank.

JKD Work “Flows”



JK Distributors, Inc. (JKD) is a distributor of equipment and supplies to residential institutions (such as hotels, motels, hospitals, and university dormitories). These residential institutions make all their purchases from one source: JK Distributors. The customers of JK Distributors benefit from having a single source for their goods, and thus have only one purchase order to create and only one check to write for their purchases. JKD's departments include the General Manager's Office, Sales, Shipping & Receiving, and Accounting.

The customers of JK Distributors have their paperwork handled for them by **Associated Buyers Corporation (ABC)**. ABC submits purchase orders, receives JKD invoices and credit memos, and sends checks and credit requests to JKD, all on behalf of its customers. ABC also receives and processes phone orders from JKD customers.

The suppliers of JK Distributors have their paperwork handled for them by **HUB Suppliers (HUB)**. HUB receives purchase orders from JKD when JKD runs low on its inventory. HUB processes the JKD purchase orders and creates invoices to JKD on behalf of its suppliers. JKD routes checks to HUB to pay supplier invoices, and HUB processes those checks on behalf of its suppliers.

Tremont Street Cooperative Bank (TSCB) is the bank for JKD and employees of JKD, ABC, HUB, and TSCB. TSCB creates bank statements for JK Distributors and individual statements for employees.

Implementation Tasks

Implementing the simulation involves four phases:

Sequence	Task
Before Week 0	Phase I: Initial Set-up and Installation
Week 0	Phase II: Preparation
Weeks 1 – 4*	Phase III: Simulation
Week 4*	Phase IV: Wrap-up

* This Facilitator's Guide assumes the simulation will run for half days for four weeks. You can vary this schedule to meet specific time constraints and training needs.

This Guide devotes one section to each of the four Phases. Note that you only perform the tasks in Phase I once. You perform the tasks in Phases II, III, and IV each time you conduct the simulation.

Phase I: Initial Set-up and Installation

Checklist for Phase I

Seq.	Task
Before Week 0	Initial Set-up and Implementation
1	Obtain a Website (usually completed before reading this Facilitator's Guide)
2	Modify the application database, if desired
3	Configure a local student shared drive and local staff shared drive
4	Copy files to the staff and student shared drives
5	Set up the five reserved simulation email accounts and facilitators accounts
6	Plan the simulation physical workspace

Obtain the Website

Each training site is responsible for contacting the Training, Inc. National Headquarters (by email at info@traininginc.org or by telephone at 317-264-6740 ext. 13) to order the simulation.

After you complete your order, Training, Inc. National Headquarters will create a website of the form <http://location.officesim.net>, where *location* is the name of the organization's training site. For example, <http://boston.officesim.net> is the website for the Boston Training, Inc. location. You will also receive a local administrator's (Admin) username and password for the website and email.

Identify the Local Administrator

The simulation website requires that each TI site identify one person as its local administrator (Admin). This individual is granted special access to the simulation website and email system, and has the authority to grant more limited access to other users.

NOTE: Training, Inc. National will send an email when the website is up, usually within 1-3 days of ordering the simulation. **Do not delete this email.** It contains important information about your website, including the web address, and the Admin's user name and password combinations for the website and email account.

3. ***Plan the Simulation Physical Workspace***

The following equipment is needed in the simulation workspace:

- A computer for each participant, if possible, to model the situation in most workplaces.
- A printer for each department or company, if possible. Otherwise, two printers in the workspace accessible to all participants.
- One or more telephones for students in customer service and sales positions, as well as for the JKD Administrative Assistant/Receptionist. It is useful, but not necessary, for managers to have phones as well.
- Access to a photocopier.
- Access to a fax machine for incoming orders (if you plan to use faxed orders).
- An inbox for each JKD department and each partner company.
- A central file box with hanging and manila file folders for each JKD department and each partner company
 - JKD Central Files – a hanging folder labeled Customers and containing an individual file folder for each customer
 - JKD Central Files – hanging folder labeled Suppliers and containing an individual file folder for each supplier
 - ABC Central Files – hanging folder labeled JKD Customers and containing an individual file folder for each of JKD’s customers
 - HUB Central Files – hanging folder labeled JKD Suppliers and containing an individual file folder for each of JKD’s suppliers
- A “Work in Process” folder for each student, also located in the central file box of the department or company to which the student is assigned
- Several large envelopes for routing paper transactions from department to department, or company to company
- An overhead or LCD projector for company orientations, weekly meetings, and Wrap-Up week activities.
- Office supplies including Post-It notes, paper clips, staplers, paper, three-ring binders, manila file folders
- A bulletin board or magnetic white board for each company for “company communications”
- In the designated JKD reception area, appropriate furnishings, such as guest chairs, a receptionist’s desk or table, a plant, artwork

Each of the four companies in the simulation requires its own workspace. This may be a separate room or, more typically, a discrete area within an existing computer lab. In addition, one space must be large enough for all-company meetings, and one more secluded space must be available for occasional managers’ meetings or employee conferences.

To delineate workspaces for each company, and for each department within the JKD company, consider using portable room dividers or some other physical barriers. It is important that the spaces look separate from one another and that they resemble offices, not classrooms. It is even more important that participants use “mail” or email or other proper channels for communications, rather than just talking across a room. The participants should feel that these are separate businesses, and that work flows along an established pathway through JKD and its partner companies.

The following techniques help to create a business environment out of a computer lab:

- Move tables and computers into different configurations
- Use portable dividers to create new workspaces
- Create signs with company and department names
- Create name cards to sit on each computer with the participant’s name and position title
- Add professional décor on the walls, such as motivational posters
- Suggest that participants bring personal, yet professional, items (such as a family photo or a plant) to make their workspaces their own.

Phase II: Preparation

Checklist for Phase II

The week before every new simulation cycle, you must establish a fresh simulation environment. This requires some or all of the following tasks.

Seq.	Task
Week 0	Preparation
1	Refresh database
2	Refresh Shared Drive files
3	Prepare "employee" email accounts
4	Prepare initial "employee" website accounts
5	Make first entries in website calendar and scroller
6	Adjust Position Duties Summary, Simulation Calendar

Phase III: Simulation

Checklist for Phase III

Seq.	*	Task
Week 1		Introduction and Overview; Applicant Selection; Orientation
Mon		Conduct Overview/Intro Session
Tue am, pm		Screen and hire applicants
Tue pm		Announce positions
Tue pm		Conduct initial department meetings
Tue pm		Conduct first Manager Meeting
Tue pm		Set up Office Space
Tue pm		Initialize the website and email system for the Orientation/Intro Session
Wed am, Thu am		Conduct the Orientation/Intro Session
Thu am		Hold second managers meeting; schedule others
Thu pm		Refresh database, email, and paper files for the Live Simulation
Weeks 2-4		Live Simulation
Daily		Prepare ongoing orders (paper & phone)
Daily		Support daily operations
Each Friday		Get summary of department work
Each Friday		Guide self-evaluations
Each Friday		Prepare department reports

Phase IV: Wrap-up

Checklist for Phase IV

Seq.	*	Task
Week 4		Live Simulation, Closing Events
Mon am		Announce International Potluck Celebration
Mon am		Introduce Presentation Guidelines
Tue, Wed, Thu		Prepare Department reports
Wed		Conduct 360 evaluations
Fri am		Facilitate students' Closing Presentations & learnings
Fri noon		Hold International Potluck Celebration
Fri pm		Tear down workspace

Appendix C. Job Positions Summary

Use the following chart to help determine how many employees will be in each department according to the number of students. In smaller groups the work of each department is handled by one or two people. In larger groups the positions in (parentheses) may have multiple employees.

If there are 8 students, you will want to fill positions 1 through 8. If there are 20 students, you will want to fill positions 1 through 20. The following is a suggested way to determine which positions should be filled depending on the number of students:

Simulation Positions by Size of Student Group					
	Department	Position	Smaller Group (positions 8-12)	Medium Group (positions 13-24)	Larger Group (positions 25+)
JK Distributors	General Manager's Office	General Manager	2		
		Assistant G. M. (Administrative Assistant)	12	19	30
		Human Resources Specialist		22	
		Sales Department	Sales Manager	3	
		(Order Specialist)	10	20, 24	26
	Shipping & Receiving Dept.	Shipping & Receiving Manager	4		
		(Shipping & Receiving Specialist)		13, 23	29
	Accounting Department	Accounting Manager	5		
		(Accounts Receivable Specialist)		14	28
		(Accounts Payable Specialist)	11		27
		Comptroller	8		
		Payroll Specialist		15	
ABC	Associated Buyers Corporation	ABC Manager	1		
		(Customers' Representative)	9	16, 21	25
HUB	HUB Suppliers	HUB Manager	6		
		(Suppliers' Representative)		17	31
TSCB	Tremont Street Cooperative Bank	TSCB Manager	7		
		Banker		18	

Appendix D. JKD Time

At JK Distributors and its partner companies, time really flies! A half-day session is actually equal to a week in “JKD time”, which means that 35-45 minutes are equal to one day. You can adjust these time spans to suit your situation.

Why use JKD time?

- Payments that are “net 30” can be processed within a simulation that lasts less than a month.
- Timesheets and weekly payroll occurs once a day.
- Participants can complete the entire workflow many times during a few weeks. *How to*

initiate it?

- Start each session by putting a notice on a white board or flip chart in a visible location: “This is the week of **/**/**.”
- List times and dates so that everyone can see them, such as:

9:00-9:35	Monday, May 3
9:35-10:10	Tuesday, May 4
10:10-10:45	Wednesday, May 5
10:45-11:20	Thursday, May 5
11:20-11:55	Friday, May 7

- Modify the calendar on page 26 of the Orientation guide with current dates during which the simulation will be running. Leave the simulated dates as is.