

A grayscale photograph of a classroom where several students are seated at desks, working on computers. The focus is on a young man in the foreground, who is looking intently at his monitor and typing on the keyboard. Behind him, other students are also working, though they are slightly out of focus. The overall atmosphere is one of quiet concentration and learning.

# Virtual Volunteer Guide

Creating Meaningful Classroom  
Connections in a Virtual Environment

EVERFI

## ***Virtual Volunteer Toolkit***

**Thank you for volunteering your valuable time to connect with students and bring real-world learning into the classroom! While we might not be together in person, we can still make a difference in the lives of students.**

COVID-19 and the resulting school closures has radically disrupted the learning environment and visiting policies for the 2020-2021 school year. That said, teachers are still eager to have special guests join their classroom virtually to engage with students, have some fun, and bring practical, real-world discussion to their students. These engagement opportunities serve as an extension of the digital education courses that teachers are providing to their students.

This toolkit provides you with all the template resources needed to help you plan and execute a fun and impactful virtual classroom visit. While you are running this event on your own, be confident in knowing that EVERFI has provided this information for you.

### About EVERFI

EVERFI empowers educators to bring real-world learning into the classroom and equip students with the skills they need for success – now and in the future. Three out of five U.S. school districts use EVERFI’s digital resources to teach topics like health and wellness, financial education, and social emotional learning. EVERFI has more than a decade of experience organizing meaningful events in schools.

### The Importance of Financial Education

Today, families across the country are grappling with unprecedented financial hardships - from losing their incomes to not being able to pay their mortgages to having to cut back their budget. This systemic issue has not only been impacted by the current economic climate, but also the lack of financial education for students and consumers. Children as young as kindergarten and pre-K can benefit from curriculum designed around the foundational skills that build toward future financial literacy, including self-regulation and prioritizing future benefits over current wants.

## ***3 Tips for Engaging with Students Virtually***

Here are some tips about engaging with students that EVERFI has learned from their experience of conducting successful virtual events.

### **Keep it Brief**

We recommend that events are no longer than 30 minutes and include transitions that allow for two-way engagement (polling, etc.) to recapture students' attention.

### **Make it Personal & Relatable**

You may be the first person a student has met from a particular industry or from your career focus area. Share your personal story to expose students to your educational and career path. Feel free to share moments from your youth that helped lead you in the path you took. It may get them thinking about their own!

### **Enjoy Yourself & Have Fun**

Working with students can be fun, thought-provoking, and unpredictable! It's ok to say, "I'm not sure" if a student asks a question outside of your knowledge area or to joke about technical difficulties. Smile through those moments and be ready to shift topics based on student engagement, feedback, and interest.

## Sample Run of Show

Program Element	Time
<p><b>Event Kick-Off</b></p> <p><i>Opening</i> Teacher to intro and welcome the customer</p> <p><i>Video/Customer Commercial</i> If available and the teacher agrees to it, showcase what your organization offers through a short highlight video or commercial.</p> <p><i>Introductions</i> Introduce yourself to the group. Use these starter questions to help the students get to know you a bit more.</p> <ul style="list-style-type: none"><li>• How did you get started in your career?</li><li>• Share a personal anecdote - (i.e. Why do you think financial education is important?)</li><li>• Tell us a bit about your day-to-day responsibilities at your job.</li></ul> <p><i>Warm-Up Questions</i> Break the ice! Hear from the students, ask them a few of the discussion guide questions to get them thinking.</p> <ul style="list-style-type: none"><li>• What was your favorite part of the course?</li><li>• Why do you think it is important to be learning about this topic?</li><li>• Name one thing you learned in the course that you are going to implement into your daily life?</li></ul>	5 minutes
<p><b>Main Program</b> <i>(Customer Moderated)</i></p> <p><i>Activity</i> Connecting with students through a virtual activity is a meaningful way to extend their learning experience. Use the following activity guide to bring this education to life.</p> <p><i>Student/Customer Q&amp;A</i> Leave time for students to ask questions!</p>	20-25 minutes
<p><b>Concluding Remarks/Farewell</b> Be sure to thank the students and teachers for participating in the event.</p>	1 minute

## Panel Discussion

The panel discussion is intended for students to have the opportunity to hear from field experts and leaders on the related course topic. This experience allows students to gain a deeper understanding of the topic through live discussion, and even explore what a potential career path in your field could look like.

### Introductions:

- Tell us your name, and what your role is with the company.
- How long have you been with the company?
- What motivates you every day to do your best at your job?

### Career Readiness:

- If you could go back and tell your “high school self” one thing about preparing for your future what would it be?
- 3 tips for being successful throughout life after graduation (schedule, internships, etc)
- Did you know what career path you wanted to take after high school?



## Activity

Put students skills to the test through interactive and engaging games that bring course content to life. Use the questions and resources below to test their knowledge (and yours too!).

## Myth or Fact (This or That)

Challenge students by scenario based questions that reinforce learnings from the course. This activity will allow volunteers to engage with students and shed expertise into the subject matter.

Directions:

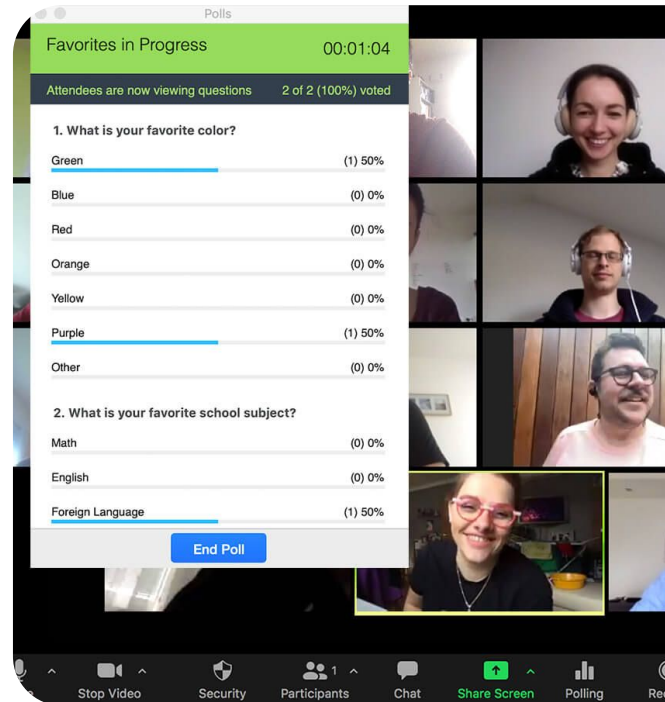
- Ask students to take out a piece of paper and write *This* on one side and *That* on the other
- Take them through a series of scenarios where they have to decide the outcome
- We encourage you to shed insight on why the answer is what it is and ask students their opinions too!

## Polling

Test the students knowledge through the polling feature in Zoom and other online platforms. This tool allows you to take students through a game of trivia and multiple choice questions.

Directions:

- Create 5-8 multiple choice questions for students to answer
- Pre-load into platform
- Launch the poll live during the event
- Have students answer the questions live during the event
- Rely on the experts in the 'room' to expand upon the question after the students submit their answers



## Price is Right

Setting budgets and accurately predicting costs can be challenging. Put students knowledge to the test through a game of the *Price is Right*! This interactive game gives students the opportunity to predict what amount certain items cost. The objective of this activity is for student's to understand the importance of budgeting and prioritization of needs vs wants. You'd be surprised by how much some of these items cost too!

### Directions:


- Provide each student with this worksheet
- Project the worksheet on your screen or embed into the event presentation
- Give them 5 minutes or so to match each price point to an item
- Reveal the results with the group
- Talk with them about the factors that contribute to why items get priced the way they do.

**The Price is Right**


Match the price of the common household item with the correct price, Note: There are 9 prices for 9 items so no prices should get used more than once.

**Price Bank**


\$3.99	\$5.99	\$14.99	\$39.99	\$49.99
\$130	\$289.99	\$299.99	\$329.99	




600 Thread Count Sheets




24 oz Cereal




136 Pack of Diapers




18 Rolls of Toilet Paper




14" Laptop




Wooden Dining Table - Seats 6



Nintendo Switch



75 oz Dish Solution



Trendy Sneakers



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## The Price is Right

### Answer Key



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\$130

## FinLit (Myth or Fact)

Engaging with students through virtual activities is a fun and easy way to reinforce course learning. Looking to host students with one of the activities previously mentioned, here are useful questions and copy for different activity types by course.

### Myths

- **There isn't a lot of financial aid available.** According to the College Board, undergraduate and graduate students received \$246 billion in grants from all sources, including federal work-study, federal loans, and federal tax credits, in 2018-19. In addition, students borrowed about \$13 billion from non-federal sources.
- **A late payment on a cosigned student loan does not affect your credit score.** The domino effect of a borrower's late payment on any student loan can be consequential. A late payment can negatively affect your credit score, and a lowered credit score can make it extremely difficult for students and cosigners to qualify for other loans like a mortgage.
- **Grants can only come from the federal and state governments.** Unlike scholarships, grants are usually based on financial need and come from federal and state governments, colleges and universities, public and private organizations, and professional associations.
- **You don't need to repay a federal loan.** Federal loans are borrowed funds that you must repay with interest. They usually have low-interest rates and offer flexible repayment terms, benefits, and options.
- **You have to have good grades to qualify for financial aid.** While having good grades can help you get into a good school and may help with academic scholarships, most federal student aid programs don't take grades into consideration when you first apply. However, don't forget that if you want to continue receiving aid throughout your college career, you'll have to maintain satisfactory academic progress as determined by your school.
- **You can't adjust your repayment amount.** While everyone's initial bill is set to the standard ten-year repayment plan, you can adjust that. Graduated, extended, income-based, and pay-as-you-earn payment plans are all viable options that can decrease the amount you owe each month.
- **Having a student loan won't affect my credit score.** When you have a student loan, it's similar to having a credit card in that you've been extended credit (in the form of the loan) by a lender. And, like a credit card, if you make a late payment or miss a payment altogether, you'll be negatively impacting your credit score.
- **If I pay off my student loan early, I'll have to pay a penalty fee.** Most student loan lenders don't charge a prepayment penalty if you decide to pay your loan off early.

## FinLit (Myth or Fact)

### Facts

- **The FAFSA can (and should) be filled out before applying to colleges.** It's in your best interest to complete the FAFSA form as soon as it's available (usually October 1<sup>st</sup>) during your senior year ... even if you haven't decided which colleges you'll be applying to. If you list a college on your FAFSA and decide not to apply there, no worries: the college will simply disregard your form.
- **Don't wait until you graduate to start paying back student loans.** You could potentially save money on interest by making payments toward your student loans while you're still in school. You can even choose how much you pay and how often.
- **There are several ways to finance higher education, including private and federal financial aid, loans, scholarships, grants, and personal savings.** From federal financial aid to loans and scholarships, there are so many ways to pay for your higher education. Besides taking out loans, families use current income and savings to pay for college. Students help too, with summer jobs and working while in school to foot the bill. Be sure to explore all of your options when paying for your education and read the terms carefully of any money you borrow.
- **Everyone with a student loan qualifies for a standard loan repayment plan.** Everyone qualifies for a standard loan repayment plan. This means you pay back what you owe based on the minimum payment amount and schedule set by your loan servicer or the organization managing your loans. You can pay more than the minimum; just be sure there aren't any prepayment penalty fees.
- **By filling out the FAFSA form, you may be eligible for some federal grants -- which means you could receive money that you don't have to pay back.** Filling out the FAFSA means you're determining your eligibility for federal loans like Direct subsidized, unsubsidized, and PLUS loans, federal work-study, and even some federal grants like the Pell grant. Grants are gifts, not loans, so if you apply for federal aid, you could receive money that you don't have to pay back.
- **You need to complete the FAFSA form every year.** The FAFSA form must be completed each year to determine financial aid eligibility. Even if you haven't qualified for financial aid in past years, you should still fill out the FAFSA every year you're in school.

## Platform Instructions

You have many platform options when it comes to hosting a virtual event. EVERFI recommends using Zoom based on its capabilities and user experience. Follow these instructions to set up your Zoom meeting.

### Setting up Zoom

- Select Webinars and then Schedule a Webinar
- Insert Event name in “Topic”
- Designate Date and Duration of webinar
- Ensure that ‘Require webinar password’ is selected
- Video: Turn OFF video for host and turn ON for panelists
- Audio: Both should be selected
- Webinar Options: Unselect Q&A (unless you want the whole group to be able to ask and see live questions coming through)
  - Select ‘Enable Practice Session’
  - Select ‘Record the webinar automatically’
- Alternative Hosts: If there is someone else from your organization that will be helping on the backend, add their email here. They must be associated with your account so if you are prompted with the message of invalid email address, add them under the User Management section
- Hit Schedule

Your webinar is now scheduled. You should now see a page that outlines all details regarding the webinar and login information. Scroll towards the bottom of the page and you will see invitations, email settings, branding, etc. All of these are customized features that you can include in your webinar, if desired.

**NOTE: EVENT SHOULD NOT BE RECORDED WITHOUT WRITTEN PRE-APPROVAL AND CONSENT. EVERFI DOES NOT RECOMMEND RECORDING THESE EVENTS DUE TO STUDENT PRIVACY.**

### Zoom Invitations

**Panelists:** Add speaking participants to the panelist section. Once email is entered and saved the recipient will automatically get an email from zoom inviting them to be a panelist to the meeting. This meeting invitation is unique to the panelist and should not be shared. This gives them audio and video capabilities.

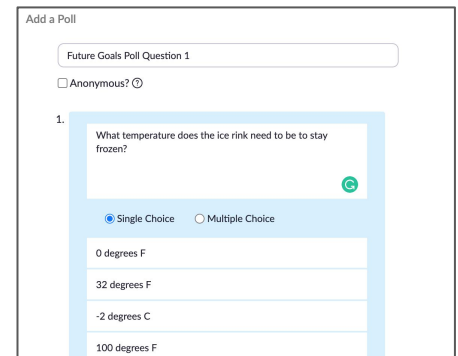
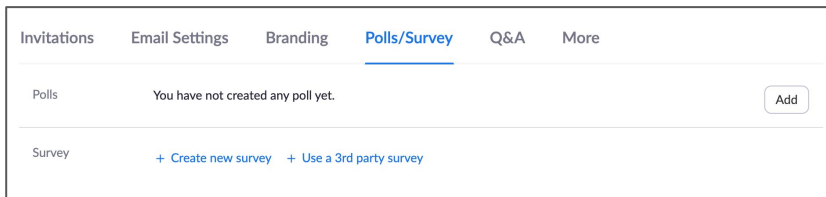
It is recommended to send this email again the evening before so it is near the top of their inbox the following day. When communicating with the host, ask them to confirm when they received the email.

## Instructions for Virtual Events Using Zoom

### Polling

If you would like to include a poll or trivia questions as part of your meeting, you should script and insert poll questions prior to the event. It is recommended that polling be set up so questions are asked and revealed one by one. To do this, you will need to add each question as its own poll using the following steps.

- Go to your webinar and select it
- Scroll to the bottom of the page
- Select “Polls/Survey”
- Select “Add”
- Add each question separately and save them
- During the event click Polls at the bottom
- Click the poll you would like to show from the dropdown menu
- “Launch” each poll question then select “End Poll”
- Select “Share Results” then “Stop Sharing Results”
- Click the next question from the dropdown and repeat



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