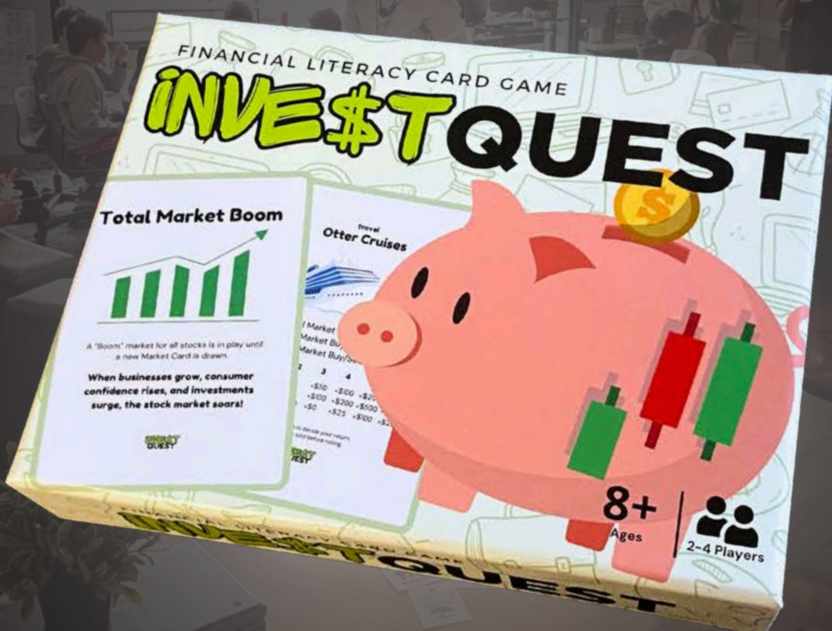
MoneyMind
GAMES



Financial Literacy Project

Roger Shi, Aarit Jayaswal, Aadi Jariwala

Canyon Crest Academy DECA
Canyon Crest Academy
5951 Village Center Loop Rd, San Diego, CA 92130
April 6th, 2026

Table of Contents

I. EXECUTIVE SUMMARY

THE PROBLEM

Financial literacy is one of the most important skills for navigating modern life, yet it remains largely underdeveloped across much of the population due to **ineffective and inaccessible educational methods**. Gaps in financial knowledge often begin as early as elementary school, where students receive **little to no exposure** to personal finance during critical developmental years. If and when financial topics are eventually introduced, they are frequently taught in abstract or **unengaging ways that fail to connect** with students' lives or interests. In a system that does not prioritize or meaningfully teach financial skills, students have **little incentive to care or engage.** As a result, many young people enter adulthood unprepared to manage essential financial responsibilities, making it **difficult to establish long-term financial stability**.

OUR SOLUTION

Addressing financial illiteracy begins with **engaging students early** and teaching finance in a way that is both **accessible and practical.** MoneyMind Games' flagship product, ***InvestQuest,*** a 2-4 player card game designed for students as young as age 8, introduces core financial literacy concepts in an **interactive format.** Through gameplay, students learn skills such as budgeting, managing risk and reward, building balanced investment portfolios, navigating taxes, and preparing for unexpected expenses.

WHY MONEYMIND?

Unlike traditional financial literacy instruction, *InvestQuest* allows students to **experience financial decision-making firsthand**. By integrating gameplay into classroom instruction, library programs, and community partnerships, MoneyMind Games delivers an **engaging learning tool** directly to educators and students, making financial literacy **relevant, memorable, and applicable** within both existing curricula and proprietary lesson plans.

GOALS - C.A.S.H.

C — Classroooms
Direct delivery and presentations to **10 elementary school classrooms**

A — Access
Reach **5,000 students** through schools, libraries, and parternships

S — Support
Empower **20 educators** with tools to overcome teaching barriers

H — Households
Provide games to **100** families, fostering interactive at-home learning

OUTCOMES

Delivered instruction in **29 classrooms**, exceeding our goal by **190%**

Reached **47,500+ students,** exceeding our goal by **850%**

Equipped **319 educators** with tools and curriculum, exceeding our goal by **1495%**

Distributed games to **524 families**, exceeding our goal by **424%**

HIGHLIGHTS

92% **Of students** report learning something new and rate the game an average of 4.91/5 stars

93% **Of parents** would recommend *InvestQuest* to a friend, with 87% saying they enjoyed playing it themselves

96% **Of teachers** view *InvestQuest* as both a game and a teaching tool, overwhelmingly citing its educational value

TESTIMONIALS

"Now this is real teaching made fun. Thank you young men for helping your community."

-Eva Lehmann, Parent

"InvestQuest is super easy to comprehend and easy to show to my students, thank you!"

-Adrianna Young, Expanded Learning Staff at SAY SD

"The game was great. The kids were very engaged in the learning and definitely having fun!"

-Mrs. Huffstutter, 6th Grade Teacher

ACTION ITEMS

1. Classrooms & Libraries

Led sessions in schools and libraries, teaching financial literacy through **hands-on gameplay**. Library sessions occur **biweekly-monthly**, with attendance ranging from **20 to 40 participants.** Classroom sessions, coordinated via **school outreach**, have reached 29 classrooms and led to direct impact on over 800+ students.

2. Product Development

Developed *InvestQuest*, a **classroom-ready card game** designed for students ages 8+, encouraging **experiential, non-digital learning**. An iterative design process saw initially hand-assembling units transition to professional manufacturing for large-scale distribution.

3. Seminars and Curriculum

Introduced educators to **proprietary lesson plans** aligned with gameplay to reinforce learning objectives and support **long-term classroom use**. A "Train-the-Trainer" model expanding impact **beyond** direct facilitation.

4. Social Media

98,750+ reached

9,170+ reached

COLLABORATIONS

The City of San Diego · Diversify Our Narrative · the YMCA · The Children's Initiative

Conferences and Classrooms

- **The Children's Initiative, Del Mar Union, and many more San Diego school districts**
- Led workshops at SD Expanded Learning Consortium and financial literacy conferences; taught educational staff.
- Presented and implemented our game-based curriculum across 4th-6th grade.

Visibility and Recognition

- **Fox 5 News, SD Business Journal, SDPL, UDC**
- 1st Place – Capital Cup Entrepreneurship Competition, sponsored by U.S. Department of Education, leading to national recognition.
- 1st Place - California DECA State Career Development Conference, PMFL.
- Established relationship with news outlets for city-wide promotion and inbound marketing.

Underserved Communities

- **YMCA, Boys & Girls Club, Diversify Our Narrative, Everyone Can Learn, and more.**
- Provide our curricula, in-person instruction, and *InvestQuest* financial literacy game.

TIMELINE
CASHFLOW

Launch | Apr 2025 - May 2025
- **Finalize game design** and market research
- Release website; design **multi-segment marketing strategy**: students, parents, and educators
- Start production of first batch; **release InvestQuest** to initial individual families; collect feedback
- First story feature on Fox 5 News; initiate **outreach to schools and educational programs**

Widen | Dec 2025 - Present
- Allocate resources and **implement specialized programming** for Title 1 schools, low-income households, and **underrepresented communities**
- **Expand distribution** and community partnerships; develop after-school program curricula
- Increase production efficiency and **reduce unit costs**

Forecast | Mar 2025 - Apr 2025
- Identifying gaps in K-12 financial education, focusing on **foundational elementary curriculum**
- Establish **social media** presence and **C.A.S.H. goals**
- Conduct early outreach to **students, parents, teachers, and schools** to validate interest
- Begin focus group testing, emphasizing game design that balances education with engagement

Operate | May 2025 - Present
- Lead **classroom seminars** and develop **multi-week gameplay-based curricula**
- Establish partnerships with educational groups and school districts; **sell/provide games to families** for in-home learning continuation
- Distribute **surveys** to teachers to **assess project effectiveness**

and beyond...

SWOT ANALYSIS

STRENGTHS
- Engaging and educational financial literacy card game for ages 8+
- Proven learning outcomes
- Pilot-tested and data-backed
- Multi-disciplinary team

WEAKNESSES
- Limited brand recognition
- High initial manufacturing costs due to low order quantity
- Constrained distribution reach
- Initial single-product focus

OPPORTUNITIES
- Rising demand for financial literacy tools
- Growing interest in gamified learning
- School and institutional partnerships
- Digital expansion

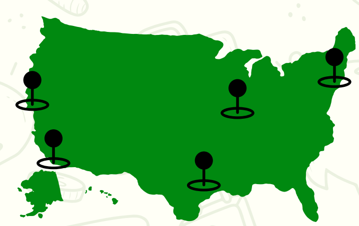
THREATS
- Established competitors in educational games
- Copycat products entering the market
- Shifts in education policies
- Budget constraints in schools and districts

FUTURE GOALS

Launch an app that expands **accessibility** and **reach** to financial literacy education, while increasing **engagement**.

NEFE
charles SCHWAB FOUNDATION
Junior Achievement

Partner with education programs nationwide, **establishing** ourselves in formal academic curriculum.



Build a sustainable **team** of motivated students to expand our initiative, including **branches** across the United States.

Further expand our initiative with our new game, **BankIt!**, which teaches more advanced financial concepts.

II. INITIATING

A. STATEMENT OF THE PROBLEM

Only 57% of U.S. adults are considered financially literate[1], and this figure has shown no meaningful improvement over time. Gen Z averages just 38% correct on the GFLEC Personal Finance Index[2], a 7-point drop from Millennials, who scored 45%. These results indicate that **young people are entering adulthood increasingly unprepared to manage essential financial responsibilities** such as budgeting, credit use, saving, and long-term planning. Despite the increasing importance of financial competence, **financial education remains largely absent from K–12 curricula**. Fewer than half of U.S. states require any form of personal finance education to graduate, and even fewer mandate a standalone course. As a result, millions of students rely on informal learning or trial-and-error once they reach adulthood, contributing to **higher debt levels, poor credit outcomes, limited financial mobility, and missed opportunities for compounding wealth**. At the same time, demand for financial education is clear: nearly 90% of Americans believe personal finance should be taught in schools, and 72% report they would have been better off had they received financial education earlier.[3] When financial literacy <u>is</u> taught, it is often delivered through traditional, lecture-based instruction that **fails to engage students or produce lasting retention**. Passive learning results in significantly lower comprehension for applied, real-world skills, while experiential and active learning methods can lead to up to 75% higher retention.[4] Gamified learning environments, in particular, increase student motivation, confidence, and participation. However, public school systems face structural barriers to curriculum innovation, including bureaucratic approval processes, and limited instructional time. As a result, **instruction often lags behind** preparing students for the financial decisions they are expected to make shortly after graduation.

88%

of U.S. Adults said K-12 education **left them unprepared** for handling money in the real world.[5]

KEY ISSUES

- **Unengaging education with no lasting impact**
- **Rigidity in established educational systems**
- **Lack of K-12 financial education programs**

B. PROJECT SCOPE

MoneyMind Games is a financial literacy initiative established ***by* students, *for* students**. Having gone through an educational system largely devoid of personal finance education, our team noticed peers and younger students struggling with essential financial literacy skills. *InvestQuest* teaches financial literacy through a **gamified, engaging approach**, informed by student surveys and refined through extensive testing to ensure **strong educational value** while remaining relevant and easy to implement.

InvestQuest builds understanding of **core financial literacy concepts**, including saving, budgeting, investing, and responsible decision-making, **promoting accessibility and cultivating interest** in an essential field that many young students never get the chance to explore. Implementing a proprietary curriculum, MoneyMind Games empowers students **to take charge in their financial learning**, strengthening confidence and financial preparedness as they progress through school and into adulthood. Partnering with school districts, our team offers **in-person instruction** using gameplay-based curricula and works with district officials to **provide games for classrooms**, allowing students to continue engaging with money in a fun and effective way. At educator conferences, our team **trains educators** across school and community programs on how to use *InvestQuest* and partner lesson plans to teach financial literacy. Our team also **extends learning into the home** through online and in-person sales, as well as by providing games to families at events.

Developing INVE$TQUEST

> Made <u>*WITH*</u> students not just <u>*FOR*</u> them
> Engaging <u>*AND*</u> Educational
> Relevant scenarios <u>*AND*</u> critical lessons that stick

Mission Statement

To educate and empower students through interactive, game-based educational experiences that make essential money skills engaging, accessible, and relevant for real-world application.

III. PLANNING & ORGANIZING

A. PROJECT GOALS

C.A.S.H. GOALS FRAMEWORK

CLASSROOMS

Deliver presentations and in-classroom instruction across 10 elementary school classrooms. MoneyMind Games aims to bring financial literacy directly into classrooms through structured, interactive instruction. By delivering *InvestQuest* gameplay sessions alongside guided discussion, the project prioritizes hands-on learning that reinforces core financial concepts in an environment familiar to students. <u>We aim to achieve this goal</u> through extensive outbound and — through publicity efforts — inbound outreach to schools and educational organizations.

ACCESS

Reach 5,000 total students through schools, libraries, and all program partnerships. A central goal of MoneyMind Games is to expand access to financial literacy education for students who may not otherwise encounter it. Through partnerships with schools, libraries, and community organizations, the project seeks to reach students across diverse socioeconomic backgrounds. <u>We aim to achieve this goal</u> through community outreach and collaborations with organizations including The Children's Initiative, San Diego Public Libraries, Diversify our Narrative, etc.

SUPPORT

Empower 20 educators with tools to overcome teaching barriers. MoneyMind Games aims to support educators by providing them with effective tools and resources to teach financial literacy with confidence. By offering gameplay-based instruction and accompanying lesson materials, the project reduces instructional and institutional barriers, empowering teachers to incorporate personal finance concepts into their classrooms and programs. <u>We aim to acheive this goal</u> through curriculum development and demos at seminars, workshops, and conferences, directly reaching educational staff that lead student groups.

HOUSEHOLDS

Provide 100 families with *InvestQuest* games, fostering at-home learning. Beyond schools and educational programs, MoneyMind Games aims to extend financial literacy into the home. By enabling families to engage with *InvestQuest* together, the project fosters meaningful conversations about money management and reinforces analog learning outside of formal educational settings. <u>We aim to achieve this goal</u> through a combination of selling channels comprised of social media, website, and in-person promotions for school parents and educator-adjacents.

S.M.A.R.T. Framework and Project Administration

MoneyMind Games structured its goals using the **SMART framework** to ensure they were Specific, Measurable, Achievable, Relevant, and Time-bound. Each goal was directly aligned with identified gaps in financial literacy education and was paired with measurable indicators to assess success. Project managers administered **post-engagement surveys** using Google Forms to collect **quantitative and qualitative data** on learning outcomes and satisfaction across different audiences. This approach allowed the team to evaluate impact, refine implementation strategies, and ensure all objectives were completed efficiently within the project timeline.

B. HUMAN RESOURCE MANAGEMENT PLAN

PROJECT MANAGERS

Roger Shi

Product Development and
Marketing Lead

- Leads product development and creative design, incorporating feedback from students, parents, and educators.
- Researched key financial concepts to ensure *InvestQuest's* accuracy and instructional value.
- Designs promotional materials and manages social media accounts.

Aarit Jayaswal

Resource Management and
Finance Lead

- Optimizes expenses in order to maximize financial health.
- Manages product inventory and the end-to-end manufacturing process.
- Built and launched an informational website and online store.
- Oversees online purchases and shipping to customers, ensuring customer satisfication.

Aadi Jariwala

Programming, Curriculum, and
Operations Lead

- Leads partnerships with schools and organizations to coordinate events and workshops.
- Oversees operations and communication to ensure consistent quality.
- Developed the *InvestQuest* curriculum for teachers and afterschool programs.

Strengths:
Creative Thinking
Graphic Design
Social Media Marketing
Adaptability

Strengths:
Financial Expertise
Risk Management
Web Design
Decision Making

Strengths:
Leadership
Organization
Formal Writing
Strategic Planning

MENTORS & ADVISORS

Daniel Cho

Operations Team Member
NYU Stern School of Business

- Assisted in day-to-day tasks and collaborated with project managers.

Brian Baum

Overseeing Advisor
Canyon Crest Academy

- Provided guidance and helped connect with teachers.

Ken Schmitt

Leadership Expert
Ascentria Search Partners

- Gave valuable advice for team management and parternships.

C. SCHEDULE

I. MILESTONES

MoneyMind Games is structured into **four major implementation phases**, each characterized by milestones that signify the completion of a critical component of the project's development. Together, these phases guide the project from early research and product design through launch, operational expansion, and long-term scalability.

PHASE 1: FORECAST

Phase 1 will focus on **research, early validation, and strategic planning** to ground MoneyMind Games in clear educational and market needs. The team will analyze **gaps in K–12 financial education**, emphasizing elementary curriculum, by reviewing education standards and existing programs. MoneyMind Games will establish a **social media presence, delineate C.A.S.H. goals, and begin outreach to students, parents, teachers, and administrators** to gather feedback. Focus groups will test early *InvestQuest* prototypes to refine **gameplay, clarity, and educational impact**. The milestone for Phase 1 is the completion of market research, outreach validation, and prototype refinement.

PHASE 2: LAUNCH

Phase 2 will center on **finalizing product development and launching *InvestQuest*** for classroom and home use. The team will complete **game mechanics, branding, packaging, and rule optimization**, launch the **MoneyMind Games website**, and execute a **multi-segment marketing strategy** through digital outreach and school engagement, targeting students, parents, and educators. The first production batch will be manufactured, tested, and distributed to **families and classrooms**, supported by **media coverage and strategic school partnerships**. The milestone for Phase 2 is the successful public release of *InvestQuest*, official website launch, and large-scale initial product distribution.

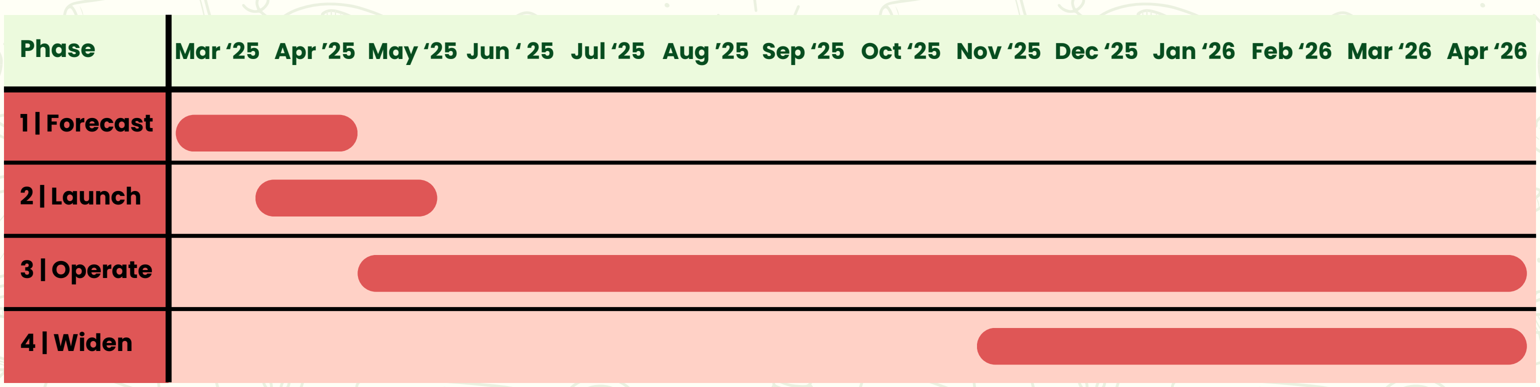
PHASE 3: OPERATE

Phase 3 will focus on **operational scaling, curriculum integration, and evaluation**. MoneyMind Games will lead **classroom seminars,** develop **multi-week curricula**, establish **school and nonprofit partnerships**, and expand **direct-to-family distribution**. Surveys and assessments will measure **student engagement and learning outcomes**, guiding continuous improvement. The milestone for Phase 3 is full operational integration across classrooms, homes, and community programs.

PHASE 4: WIDEN

Phase 4 will emphasize **large-scale expansion, inclusivity, and sustainability**. The team will implement **programming for Title I schools and underserved communities**, expand **district and nonprofit partnerships**, and improve **production efficiency to reduce unit costs** via overseas production. Digital tools and advanced curriculum modules will also be developed. The milestone for Phase 4 is to expand reach across diverse communities with inclusive access and optimized operations.

II. TIMELINE TO REACH EACH MILESTONE



D. QUALITY MANAGEMENT PLAN

To ensure both relevancy and effectiveness of each project stage, our team at MoneyMind Games followed a continuous quality management strategy based on the overarching **Plan-Do-Check-Act framework.** Each metric is further segmented into **maintenance and evaluation analyses** to ensure team responsibility, effective task management, and easy adaptability.

Plan

During the planning phase, project managers define **clear quality standards** aligned with financial literacy learning objectives and age-appropriate engagement. These standards were **informed by metrics** including student surveys, educator input, and research on **effective experiential learning**. Project effectiveness benchmarks and C.A.S.H. goals were established for both educational outcomes and user experience.

Do

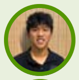
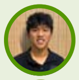
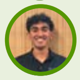
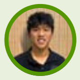
The project team will implement *InvestQuest* in classrooms, libraries, educator conferences, and community settings. Gameplay sessions will be delivered using an approach **adapted to each context** and, when applicable, **paired with curriculum materials** to ensure maximum educational effectiveness across implementations. Educator workshops and demonstrations further support proper usage, instructional alignment, and completion of project C.A.S.H. goals.

Check

Quality will be assessed through **structured feedback** collected from students, parents, and educators using post-engagement surveys and Likert-scale evaluations. Metrics such as satisfaction ratings, reported learning gains, program experience, perceived classroom applicability, and more will be analyzed to measure whether the product met predefined benchmarks. This allows project managers to continuously **identify areas for improvement** as the project **expands beyond its initial goals.**

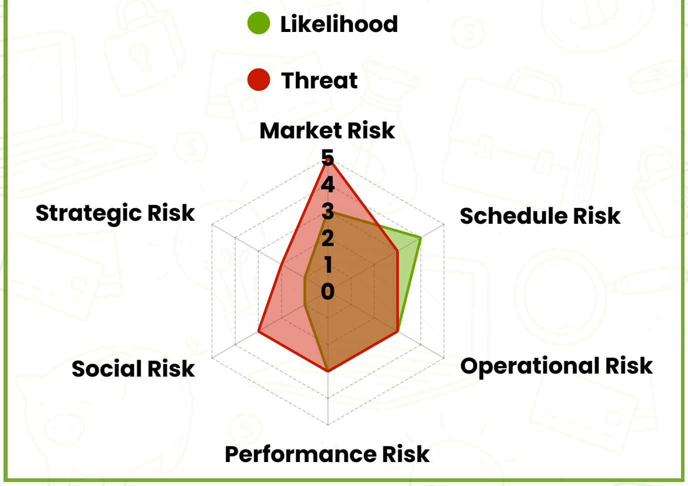
Act

Based on evaluation results, the project team will refine *InvestQuest* through **iterative updates**, including rule clarifications, balance adjustments, and curriculum improvements with three developed versions to-date. Feedback also informs changes to facilitation methods as well as student and educator guidance. This **continuous improvement cycle** ensures that quality is maintained as the project scales to new classrooms, communities, and professional partners where preparedness is expected.

METRIC	MAINTENANCE	EVALUATION	LEADERSHIP
Product	• Maintain communication with manufacturers • Track production timelines and assembly • Plan transition to fully outsourced manufacturing	• Review inventory outcomes against 30–60–90 day plans • Assess cost efficiency and production reliability	Product Development & Resource Management Leads  
Curriculum	• Ensure real-world skills relevancy through extensive research • Incorporate educator feedback into revisions • Ensure consistency across classroom and workshop materials	• Analyze educator survey responses • Review student engagement and comprehension metrics • Revise curriculum based on assessment results	Marketing & Curriculum Leads  
Workshops/ Seminars	• Coordinate scheduling with libraries, community groups and educator conferences • Prepare materials and facilitator guides • Train educators on curriculum delivery	• Attendance and participation tracking • Qualitative feedback from educators and parents	Programming & Finance Leads  
Classroom Education	• Support teachers with implementation resources • Ensure classroom sets are on-hand, distributed, and replenished • Maintain and manage a team of 4-6 vetted high-school volunteers for instructional support	• Pre- and post-lesson student surveys (Likert scales) • Review learning outcomes through teacher follow-ups and feedback	Curriculum & Resource Management Leads  
Outreach/ Social Presence	• Maintain partnerships with schools, libraries, and community organizations • Manage social media and press outreach • Coordinate event participation and promotional materials	• Track engagement metrics (reach, impressions, inquiries) • Monitor conversion to classroom adoption, workshops, and product sales	Marketing & Resource Management Leads  

E. RISK MANAGEMENT PLAN

Our team used a **Six Sigma Risk Management Plan** to channel our focus towards the most critical tasks and avoid bias. In the Forecasting phase of our project, we assessed potential risks and implemented mitigation strategies to ensure maximum scalability, impact, and operational efficacy. For each risk, we considered potential threats to accomplishing our project goals and their respective likelihoods of occurring, assigning a **composite risk score** based on impact and probability. Using a top-down approach, **risks with the highest scores were prioritized** and addressed first, while lower-level risks were subsequently evaluated, with re-evaluations conducted every two months.



SCORE	RISK	MITIGATION STRATEGY
8	**Market Risk** Failure to engage participants (students, educators, parents), resulting in low adoption or repeat usage.	MoneyMind Games will use **focus groups** and **post-presentation feedback** (verbal, online reviews, and surveys) from students, parents, and educators to **refine engagement and clarity**. Gameplay will align with existing financial literacy curricula, while trained presenters, standardized educator materials, and a strong digital presence will ensure **alignment with institutional expectations and educational values**.
7	**Schedule Risk** Project managers' busy schedules lead to missed opportunities, delayed events, or incomplete execution.	**Gantt charts** will be used to assign tasks, track dependencies, and monitor progress across initiatives. Events will be **scheduled well in advance** with buffer time built around academic calendars and project manager availability, while maintaining shared scheduling tools, milestone checks, and documentation will ensure visibility, accountability, proactive planning, and coordination for all project managers.
6	**Operational Risk** Breakdowns in production, fulfillment, or logistics impact delivery quality or reliability.	**Standardized operating procedures** will guide production, inventory management, event execution, and educator onboarding to ensure consistency and reliability. **Buffer inventory** will be maintained during peak demand periods, **team members will be cross-trained** to reduce single points of failure, and tools such as Shopify and Square will track fulfillment, costs, inventory levels, and timelines in real time.
6	**Performance Risk** The product does not deliver measurable learning outcomes, reducing credibility with educators and institutional partners.	The product will be **aligned with recognized financial literacy standards** and age-appropriate learning objectives. Before and after activity assessments will measure knowledge gains, while gameplay will be **continuously refined** using educator feedback and pilot data. Summarized performance results will be shared among the project managers to demonstrate impact, accountability, and program effectiveness.
4	**Social Risk** A weak or inconsistent professional brand image jeopardizes current or future partnerships with schools, nonprofits, and organizations.	**Consistent branding guidelines** will be applied across all platforms to maintain a professional and credible image. Data-backed outcomes, pilot results, and testimonials will **reinforce trust with partners**, while **engaging short-form social media content** (10,000+ impressions per quarter) will highlight real classroom use, testimonials, and learning outcomes to strengthen trust, visibility, and long-term adoption.
3	**Strategic Risk** Unknown internal or external factors (policy changes, staffing constraints, shifting school priorities) derail project goals or timelines.	The team will implement **30–60–90 day planning cycles** and hold **biweekly project manager meetings** to monitor progress, align priorities, and identify risks early. Clear success metrics, documented decision criteria, and flexible planning structures will **enable rapid adaptation** to policy changes, staffing constraints, shifting school priorities, and emerging partnership opportunities.

F. PROPOSED PROJECT BUDGET

MoneyMind Games operates using a **hybrid financial model** that combines the initial team investment, earned revenue, and grant funding to create a **financially sustainable** and **scalable** financial literacy initiative. Our budgeting strategy emphasizes responsible financial management, cost optimization, reinvestment, and long-term impact, ensuring that **all funds directly support fulfillment of C.A.S.H. goals** and organizational growth.

INITIAL INVESTMENT (PROPOSED BUDGET)

Category	Amount	Purpose
Game Production Materials	$455.50	Game and packaging materials for initial batch (50 games)
Website Hosting & Platform	$3.00	Three months of hosting with operational cost of $1/mo (trial period)
Domain Registration	$18.00	Purchase of playmoneymind.com
Cash Available	$23.50	Miscellaneous purchases (Flyers, Table Cloth, etc.)
Total Initial Investment	**$500.00**	

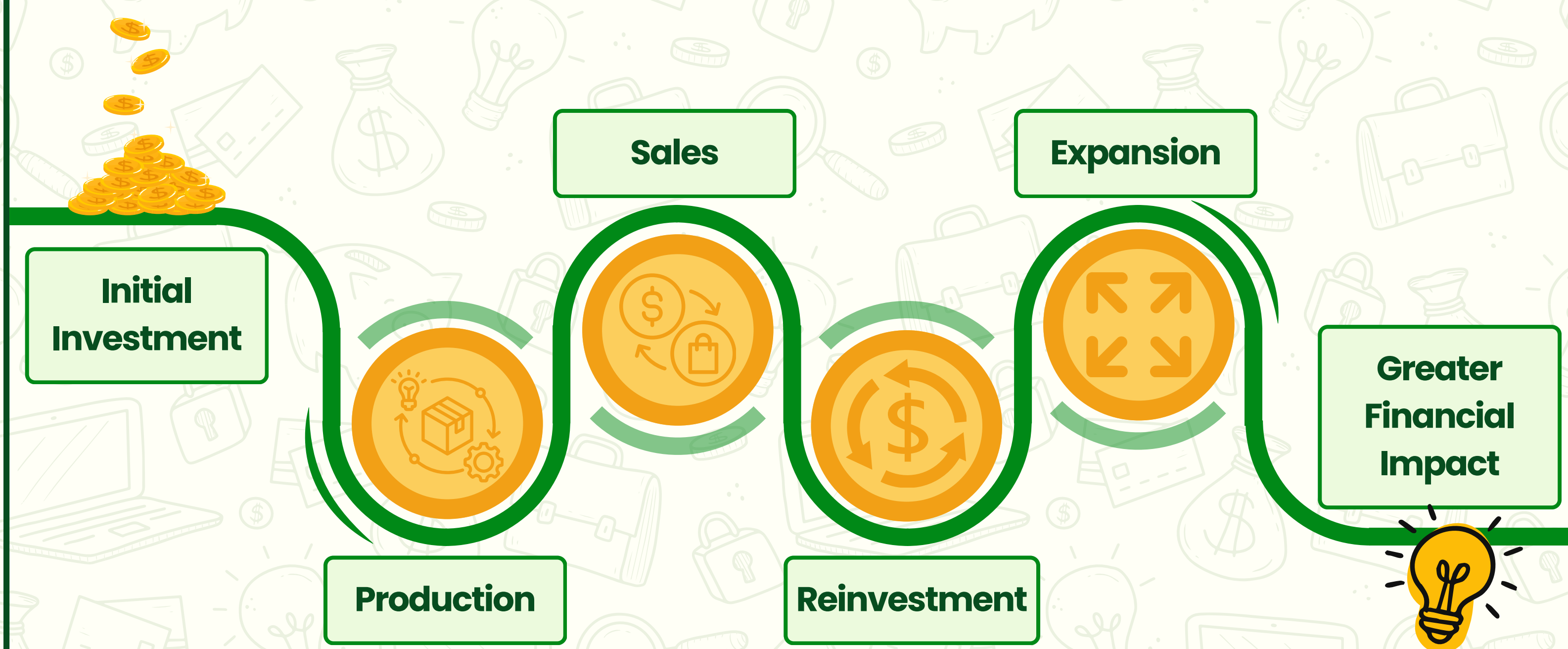
OPERATIONAL FUNDING SOURCES (ALL TIME)

Source	Amount	Purpose
Product Sales Revenue (Includes InitialInvestment)	$7,418.68	Inventory expansion, marketing, product improvement, outreach
Grant - Diversify Our Narrative	$1,798.00	Purchase of materials for minority-focused financial literacy event
The Children's Initiative Funding	$400.00	Financial literacy workshop reimbursement
Total Operational Funds Managed	**$9,616.68**	Funds used to scale and sustain the project

100% reinvested!

BUDGET STRATEGY & REINVESTMENT MODEL

MoneyMind Games follows a self-sustaining reinvestment strategy, where **all earned revenue is reinvested into the organization**. Funds are strategically allocated toward sustaining ongoing operations, expanding inventory and improving production efficiency, enhancing product quality and packaging, scaling marketing and outreach efforts through Meta Ads and flyers, hosting community-based financial literacy workshops, and developing future educational tools and games.



IV. EXECUTION

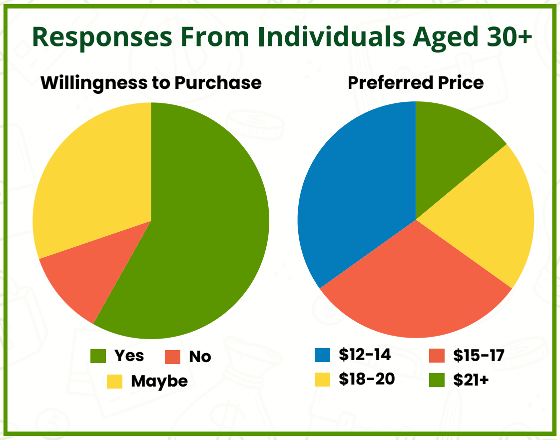
Phase 1: Forecast

March 2025 - April 2025

Market Research & Initial Testing

MARKET RESEARCH

We began with **secondary research**, reviewing existing financial literacy curricula and recognizing gaps and key topics. This research helped us identify entry points **suitable for elementary school students**, including **investing, budgeting, and paying taxes**. The largest concern we recognized was the traditional style of teaching financial literacy: passive learning and rote memorization. Further research on the psychology of teaching made the focal point of our initiative clear: **fun and active engagement**. Once our team agreed that the best way to achieve this was by creating a **financial literacy game**, we conducted **primary research** by distributing surveys in our local area, identifying market demand and preferred price points. Finally, we implemented **experimental research** through focus groups testing early *InvestQuest* prototypes, observing engagement levels, and comprehension of financial concepts to refine gameplay.

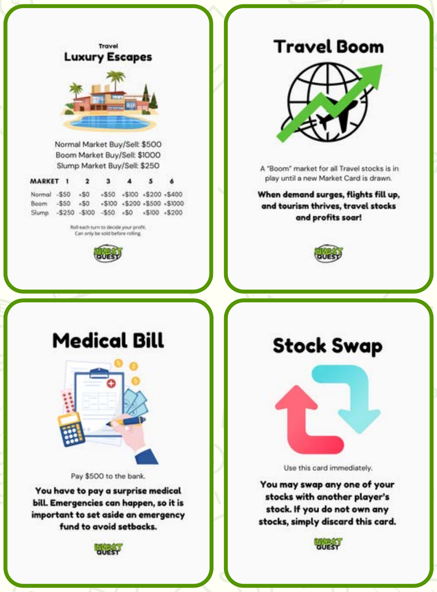


PRODUCT DEVELOPMENT

Our team started the **product development and initial testing stage** by determining the target age range of our product. Our team ultimately decided to gear our teaching towards **ages 8 and up**, when children begin developing critical and abstract thinking skills. Additionally, children begin to become familiar with other board and card games at this time, fostering appeal towards *InvestQuest*. Our market research phase helped determine **appropriate and crucial concepts**, though our team needed to translate these concepts into a playable context. Our product development lead began by creating a **stock market ecosystem**, utilizing data from the New York University Stern School of Business to create "stock" cards with accurate fluctuations and returns. Once a viable game was created, we began **play-testing with family, friends, and elementary school students**, tweaking the game until we reached a final product.

PRODUCT DETAILS & INNOVATION

InvestQuest enables students to learn financial literacy concepts through **age-curated and relevant descriptions** on each card. Card descriptions provide students with **real-world strategies**, such as setting aside an emergency fund to handle unexpected expenses. Students learn **basic investing principles** such as buying low and selling high, portfolio diversification, 50/20/30 budgeting strategies, and balancing risk and reward. Stock returns are determined by a dice roll, illustrating the concept that **returns follow a "random walk"** despite macroeconomic market conditions. Expenses such as taxes, grocery shopping, debt repayment, and medical bills encourage students to **build up cash reserves and fortify healthy spending habits**. Our team incorporated several ability cards, keeping *InvestQuest* fun and refreshing, while also introducing more strategic aspects to gameplay. Students must make informed investing choices to be successful, similar to investing and finance in the real world.



Initial play-testing within one of our DECA Chapter meetings.

Phase 2: Launch

April 2025 - May 2025

Release Website & Initiate Production and Outreach

MANUFACTURING & PRODUCTION

During Phase 2, we aimed to first establish a **reliable production process** to support both sustainability and accessibility. We identified competitive manufacturers across the U.S. that offered efficient delivery timelines. We initially hand-assembled games to produce *InvestQuest* for as low a cost as possible, generating more **affordable prices** for parents, teachers, and organizations. Our strong margins allowed us to **donate games** to classrooms and community programs while also sustaining the project and increasing re-investable funds through direct sales. To control quality, project members were put in charge of different tasks during assembly, like folding boxes, counting play money, or packaging items. This ensured **consistency and readiness for distribution.**

WEBSITE LAUNCH

Our website, **playmoneymind.com** generated 73% of our total revenue

MoneyMind Games launched our official website, playmoneymind.com, to serve as a **central hub** for information, outreach, and sales. The site was designed to explain InvestQuest's mission, showcase its educational value, and provide **easy access to resources** for parents and educators. Setting up a meeting with a marketing professional from San Diego State University, we created a plan to develop and optimize our digital infrastructure. To improve **search engine optimization (SEO)** and drive organic traffic, we published a blog post on the merits of gamified learning and its applicability to financial literacy education. Further, we developed a **marketing funnel**, connecting our website to social media platforms, where trend-based and A/B-tested **content strategies** were implemented to improve engagement, brand recognition, and reach within our target markets. Additionally, an online store and in-person point-of-sale (POS) system were created to support both digital and event-based purchases as well as to roll out discount codes and offers aimed at promoting brand loyalty.

BEGINNING COMMUNITY OUTREACH EFFORTS

We initiated outreach efforts to build awareness, garner community interest, and drive real-world adoption. At our first **library event**, we worked closely with staff to schedule programming and become an official partner of the City of San Diego. We utilized our **digital marketing channels** to promote the session to local families and prepared educational materials centered around *InvestQuest*. We aimed to facilitate a gameplay-based session tailored to a **mixed-age audience**, including parents and students ranging in age from 7 to 15. The event attracted approximately 40 students and parents, quickly developing into an ongoing relationship. The library became a **key community partner**, generating consistent sales, referrals, and future programming opportunities. Post-event surveys showed high student interest in learning more about finance, while qualitative feedback from parents was overwhelmingly positive, citing engagement, clarity, and real-world relevance. Similarly, at our first **classroom event** at Pacific Sky Elementary, students participated in guided rounds of *InvestQuest*, preceded and followed by structured presentations, discussions, and reflections. Students raised their hands to highlight lessons they learned from the game, to which we assigned key terms and **emphasized real-world relevance**, including the benefits of buying low and selling high, portfolio diversification, and practical saving. Our team also conducted **door-to-door** outreach to engage local families and community members. These efforts were amplified through earned media coverage, including a feature on Fox 5 KUSI News, which significantly expanded visibility and credibility.

April 4th, 2025
Pacific Highlands Ranch Library

April 14th, 2025
Pacific Sky Elementary

April 22nd, 2025
Sage Canyon Elementary

Phase 3: Operate

May 2025 - Present

Distribute Games & Develop Curricula

EXPANSION OVERVIEW

During Phase 3, we shifted our team's focus to **sustained operation** by expanding the distribution of *InvestQuest*, broadening the reach of classroom implementation, and formalizing our educational approach. We surpassed our initial Classroom Reach goal as demand grew from educators and school administrators. Continued student engagement and strong parent interest at home helped with achieving our Household and Student Reach goals as well. Following our Quality Management Plan, we **implemented community feedback** to further reinforce the effectiveness of the game, leading to repeat purchases and ongoing use. Our team also entered conversations with several schools that expressed interest in purchasing classroom sets of *InvestQuest*, positioning the game as a **recurring instructional tool** similar to established classroom resources such as *Math 24*. Additionally, as we observed the success of *InvestQuest,* we began to plan *BankIt!,* a new game for older kids.

CLASSROOM EXPANSION

As distribution expanded, we **strengthened relationships with educators**, especially through word-of-mouth among 4th, 5th, and 6th-grade teachers or adjacent educational staff in the Del Mar Union School District, where all project managers graduated from. This led to a direct increase in the number of classroom-based gameplay sessions and the MoneyMind Games team's credibility. We began to make use of **inbound outreach**, collaborating directly with schools to schedule sessions that worked with what students were already learning, **adapting for each specific context**. 5th-graders take part in BizTown, a real-world business immersion, and 6th-graders participate in the Stock Market Game, both relevant experiences that we directly **connected to the lessons learned** during *InvestQuest* gameplay and supplementary presentation sessions. Students were able to build interest and gain direct insight into how financial literacy functioned in real-world environments. With each classroom, our team refined gameplay flow, discussion prompts, and the emphasis placed on certain learning outcomes. Building on InvestQuest's engaging nature, which keeps students interested, we introduced **challenges with prizes**. Students with the most money in each class, school, and overall received prizes, helping them stay focused on the goal while learning how to **maximize opportunity and minimize risk**. Our team concluded each session by asking students what they learned, both good and bad. We identified each takeaway by connecting to real-world applications. For example, when students highlighted the benefits of holding stocks across several industries, we taught the related concept of portfolio diversification and maintaining balanced holdings.

Presentation Format

10 Min: Introducing Financial Concepts
- Interactive class discussion.
- Explain stocks, market trends, budgeting (50/30/20 rule), etc.

30 Min: Play *InvestQuest*
- Setup groups of four students.
- One project member guides each group, explaining the game and its concepts.

10 Min: Clean Up and Reflection
- Ask each group, "what did you learn?"
- Connect in-game learning to real-world
- Expand on learned concepts as a class


September 15th, 2025
Torrey Hills Elementary


October 15th, 2025
Ocean Air Elementary


November 25th, 2025
Pacific Highlands Ranch Library


December 13th, 2025
Pacific Highlands Ranch Library


Jan 6th, 2025
Carmel Del Mar Elementary

The Children's Initiative

CHILDREN'S INITIATIVE PARTNERSHIP

In addition to classroom expansion, we established a key partnership with the Children's Initiative, enabling our team to deliver **in-person seminars for educators** at their annual conference with staff from **over 27 school districts**. This partnership expanded outreach to program staff and educational organizations, allowing us to facilitate collaboration with members of the Children's Initiative consortium, including the YMCA, Boys & Girls Club, High Tech High, and other community-based education partners.

Phase 4: Widen

November 2025 - Present

Expand Reach & Optimize Efficiency

February 25th, 2026

Educator Training Workshop

EDUCATOR WORKSHOPS & COMMUNITY-BASED SEMINARS

To maximize impact, we **expanded educator-facing workshops** and financial literacy seminars through partnerships such as the Children's Initiative. Workshops, including "Touching Minds, Shaping Futures," allowed the team to reach educators and program staff from organizations **serving underserved populations**. Educational staff from the YMCA, Boys & Girls Club, and other community-based programs were trained on how to effectively implement *InvestQuest* within their specific learning environments. This hands-on training **empowered educators** to deliver engaging and effective financial literacy instruction to their specific classrooms, camps, and programs with our support, helping us meet our Educator Reach goal while scaling impact **beyond direct facilitation.**

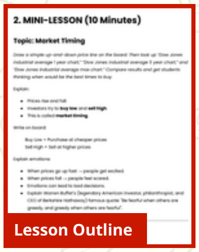
November 15th, 2025

TMSF Conference for Expanded Learning Staff

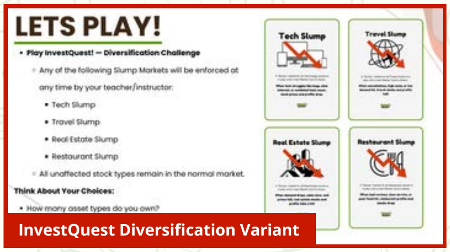
Educator Training Workshop

AFTERSCHOOL EXPANSION & PROGRAM INTEGRATION

Building on established credibility with schools, we connected with afterschool programs through the Children's Initiative's city-wide education consortium and our advocates at the County Office of Education. These connections enabled the scheduling of structured program sessions designed for **long-term engagement**. To support these programs, our team developed an **eight-week curriculum plans** covering foundational financial literacy and investing concepts. Each curriculum is centered around *InvestQuest* gameplay as the primary engagement tool, ensuring sustained student interest while reinforcing key learning objectives. We initially tested this model reaching out to charter schools (Harriet Tubman Village Charter and Darnell Charter) and **establishing a partnership** with the extensive San Diego Unified School District to begin rollout in K-8 schools.



Lesson Outline



InvestQuest Diversification Variant

- ✓ Integrated into **after-school programs**
- ✓ Enabled direct support via **student-facing lessons**
- ✓ Educators implemented our **8-week curriculum**
- ✓ Significantly surpassed our **Student Reach** goal

EXPANDING ACCESS IN UNDERSERVED COMMUNITIES

Our team prioritized expanding access to financial literacy in underserved communities by **forming strategic partnerships** with student-led organizations and community groups. We partnered with **Diversify Our Narrative**, a national organization focused on increasing access and representation in education, which provided a $1,700+ stipend for the purchase of *InvestQuest* games to support student workshops. This partnership enabled both financial sustainability and direct impact, **reaching students who benefit most** from accessible financial education. Additionally, through collaboration with Canyon Crest Academy's CCA UNITE, our team connected with students, parents, and industry professionals from **across the district**, using a dedicated booth to expand awareness and build meaningful networks with adjacent community-service student groups including Everyone Can Learn, Compassionate Companions, etc as we explore further expanding community work.

EXPANDING ON CONNECTIONS

Each of our educator workshops concluded with a survey, collecting attendees' contact information. With this, we **individually followed up** with attendees and provided curriculum materials, free training workshops, and discounted *InvestQuest* classroom packages. This allowed our team to secure **individual educator training sessions** at sites, including the YMCA. Furthermore, this opened up connections to additional opportunities such as the **BOOST Educator Conference,** held in Palm Springs from April 28–May 1, one of the **world's largest gatherings** of education professionals, which our team will attend following ICDC to build networks, contacts, and partnerships. Additionally, we are planning to host a **MoneyMind Games Gala** at the end of May, bringing together collaborators and partners at an exclusive venue for a **high-impact networking** and relationship-building event.

March 18th, 2026

National School District YMCA

COMMUNITY ADVOCACY EFFORTS

Advocacy Flyer

Door to Door

At each event we hosted, our team distributed flyers encouraging parents and educators to **advocate for expanded financial literacy education** by sharing our initiative and **directly contacting policymakers** via email. Further, we partnered door-to-door sales with our grassroots advocacy efforts, **leveraging the customer touchpoint to its fullest extent**. By engaging these key stakeholders, we extended our impact and contributed to a broader, **statewide effort**. This grassroots endeavor empowered a total of over 80 households and 300+ community members to take an active role in **shaping educational outcomes**. Through consistent outreach, we amplified community support for systemic change and reinforced the need for **accessible financial literacy education**.

DEVELOPING *BANKIT!*

InvestQuest's recommended ages currently range from ages 8 to 14, touching on the basics of financial literacy. To **expand our serviceable market**, our team developed *BankIt!,* a **new financial literacy card game** targeted at students of older ages. This game seeks to equip teenagers, ages 12+, with more advanced financial literacy skills, building off of InvestQuest. *BankIt!* teaches topics such as compound interest, bonds, retirement funds, loans, and credit; crucial skills as teenagers enter the next step in their journey towards the workforce or higher education. We are following the iterative, feedback-based game development process used in the success of *InvestQuest* as we begin to **rollout *BankIt!* in high-schools** starting locally with Canyon Crest Academy and Torrey Pines High School.

BANKIT!

BankIt! is designed to align with students' personal milestones:

- College Finances
  - Scholarships, Student Loans, 529 Plan
- Retirement Plans
  - 401(k), Roth IRA
- Managing Credit Score

EXPANDED LEARNING ENRICHMENT OPPORTUNTIES

Our team expanded its reach by **training 15 YMCA educators** during their Spring Intersession, equipping them to independently deliver *InvestQuest* alongside our partner curriculum. This **train-the-trainer model** enabled seamless integration across **dozens of YMCA classrooms** across 2 independent sites. Further, in partnership with the **San Diego County Office of Education,** we are launching Expanded Learning (ExL) programs within Del Mar Union School District (DMUSD) and Solana Beach School District. Following initial program rollout, our team will pilot the *InvestQuest* and *BankIt!* curriculum lessons across selected ExL sites, collecting data on student engagement, lesson effectiveness, and educator feedback. These insights will inform **iterative improvements** and **support broader district-wide expansion**, with the long-term goal of establishing our model as a standardized enrichment offering across Southern California and national school systems.

V. MONITORING & CONTROLLING

A. MONITORING

Alongside execution phases, we **continuously monitored progress** to ensure the project stayed aligned with timelines, goals, and quality standards according to our Quality Management Plan. Project managers used **structured planning tools** and **feedback mechanisms** to track performance, identify gaps, and inform data-driven decisions before issues escalated.

TRACKING PROGRESS: STAYING ORGANIZED

We maintained a series of detailed **Plans of Action (POAs)** that were updated weekly to track tasks, monitor deadlines, and delegate specific responsibilities to appropriate leads. Weekly team meetings held over Google Meet served as a **critical touchpoint** for our team to review progress, identify potential bottlenecks, and realign objectives with the broader project roadmap. By integrating these weekly updates with live status tracking, we ensured a **high level of accountability** and allowed Project Managers to reallocate resources in real time when tasks encountered unexpected complexity. For example, after our first batch of *InvestQuest* games **rapidly sold out** due to media coverage and high interest from community members, we were left with limited games to host events, causing delays in event scheduling and marketing. A team meeting in which our Resource Management Lead communicated with our Programming and Marketing Leads **brought the team on the same page** as we decided how production and allocation of materials would work going forward. This **structured communication cadence** ensured all team members remained synchronized and proactive rather than reactive.

Monitoring & Controlling Framework

Weekly internal reviews and POA's — QMP-based status assessment — RMP-based action implementation

MoneyMind Games Educator Survey

Completing this survey will provide us with valuable feedback to help improve our
so please be completely honest when filling it out (don't be afraid to be critical). Th

* Indicates required question

Email *

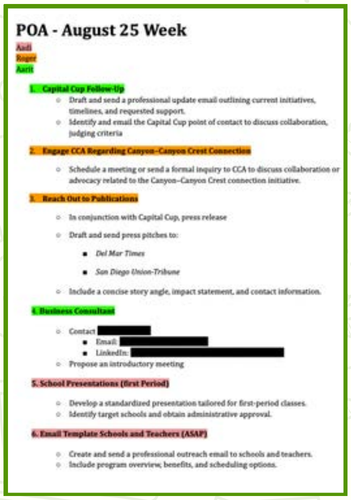
Your email

Do you feel current school systems adequately teach financial literacy?

- Yes
- No
- Other:

Do you think financial literacy should be required in school curricula?

Survey administered to teachers after a classroom showcase or conference. Some questions are adapted for each context.



POA - August 25 Week

Aadi
Roger
Aarit

1. Capital Cup Follow-Up
   - Draft and send a professional update email outlining current initiatives, timelines, and requested support.
   - Identify and email the Capital Cup point of contact to discuss collaboration, judging criteria
2. Engage CCA Regarding Canyon–Canyon Crest Connection
   - Schedule a meeting or send a formal inquiry to CCA to discuss collaboration or advocacy related to the Canyon–Canyon Crest connection initiative.
3. Reach Out to Publications
   - In conjunction with Capital Cup, press release
   - Draft and send press pitches to:
     - *Del Mar Times*
     - *San Diego Union-Tribune*
   - Include a concise story angle, impact statement, and contact information.

4. Business Consultant
   - Contact [redacted]
     - Email: [redacted]
     - LinkedIn: [redacted]
   - Propose an introductory meeting

5. School Presentations (first Period)
   - Develop a standardized presentation tailored for first-period classes.
   - Identify target schools and obtain administrative approval.

6. Email Template Schools and Teachers (ASAP)
   - Create and send a professional outreach email to schools and teachers.
   - Include program overview, benefits, and scheduling options.

Example POA from a week in August following our Capital Cup 1st Place win. Tasks are assigned by color.

REVIEWING PROGRESS: FEEDBACK & SURVEYS

Following each event or gameplay session, we collected feedback using Google Forms to **evaluate effectiveness** and participant experience. Survey responses from students, parents, and educators were analyzed to measure engagement, learning outcomes, and areas for improvement, allowing the team to **make timely adjustments**. Survey questions administered to educators at the "Touching Minds, Shaping Futures" conference included **quantitative** (How often would you use this product at your program?, Does your program have allotted free time where students have access to games like *InvestQuest*?", How often do you discuss financial literacy topics with your students?, etc..) as well as **qualitative** questions (What are your thoughts on today's workshop?, In future games for older age groups, what concepts would you like to see taught?, etc).

MONITORING SPENDING

Throughout the project, we carefully monitored expenses to **minimize operational costs while maximizing long-term impact**. To reduce unit costs and enable large-scale distribution in the Widen phase, we transitioned to overseas manufacturing, **lowering production costs by 56%** and allowing us to efficiently produce 500 *InvestQuest* units. All generated revenue was reinvested into high-return growth initiatives, including **printed flyers** for school and community outreach, **targeted Meta advertising campaigns** (averaging $60 per ad) to expand digital reach, and **branded polo shirts** to enhance professionalism and credibility during educator workshops and partner meetings. This disciplined budgeting and reinvestment strategy allowed MoneyMind Games to **scale sustainably while maintaining affordability and operational efficiency**.

B. CONTROLLING

When challenges arose, we followed our established risk management plan by identifying the issue early and implementing predetermined corrective actions. With "Monitoring" aligning with the Check phase of our Plan–Do–Check–Act (PDCA) quality management philosophy, "Controlling" represented the Act phase. Our team used feedback collected from three primary stakeholder groups—**students, parents, and educators**—to implement targeted improvements and refinements.

KEY ISSUES ENCOUNTERED

Issue 1: Low Social Media Engagement

Initial social media posts **did not generate consistent engagement**, limiting brand awareness among target student and parent audiences. This reduced visibility impacted early momentum for promotions, event outreach, and online selling channels.

Increased engagement by joining event-related information with short-form, trend-based content on a regular schedule, including pop culture content. Visual, timely content greatly improved impressions (+750%), interactions (+415%), and audience retention (+49%).

Issue 2: Purchase Hesitation at Events

Some attendees expressed interest in *InvestQuest* but **hesitated to make a purchase** during in-person events, hampering our goal to bring financial education to households. This limited immediate conversions despite high engagement and positive feedback.

Implemented discount codes, such as the JOY holiday discount code, to drive purchase orders and returning customers. Designed event-specific flyers and distribution after events led to a 125% increase in *InvestQuest* purchases at comparable library events.

Issue 3: Low Response Rate

Outreach emails to educators and school officials initially received significantly **low response rates**, slowing down classroom adoption and partnership development. Generic messaging and timing limited visibility in crowded inboxes.

Refined communication strategy by tailoring messages to each recipient, emphasizing existing connections in subject lines, and optimizing send times and follow-up schedules. These adjustments improved open and engagement rates, as measured by Mailtrack, and overall responses.

COLLECTING FEEDBACK

Student feedback highlighted opportunities to make *InvestQuest* more engaging and intuitive. This input guided an **iterative development process**, resulting in three versions of the game, each refined based on player experience. In the first version, students reported a **lack of clarity surrounding the impact and use of certain action cards**, including Stock Swap and Reroll. In response, we **revised the rulesheet and updated card descriptions** to clearly explain when and how these cards could be used. In the second version, players noted a shortage of paper money, especially $100 bills, as games often extended beyond the $5,000 win condition. While this reflected **strong engagement**, it also highlighted the **need to adapt the game to better support longer play sessions and deeper interaction.**

Parent feedback focused on learning outcomes and real-world application. While parents observed high levels of student enjoyment and discussion during gameplay, they emphasized the importance of **actionable takeaways and accessibility**. Many parents learned about InvestQuest through schools or community connections and expressed **interest in participating** in library events with their children. Parents recommended increasing the frequency, visibility, and availability of library events. Leveraging this feedback and the strong performance of prior events, we scheduled library sessions several months in advance. Our team improved **promotional material**, utilizing platforms such as Nextdoor and Instagram more heavily and further in advance. Our current partnership with the library reflects community demand as we now host **bi-weekly to monthly events scheduled through May 2026**.

Educator feedback centered on clarity regarding *InvestQuest's* **classroom implementation**. Teachers who observed in-class sessions recognized the game's effectiveness and expressed **interest in ongoing use**. Through collaboration with school administrators, districts purchased classroom sets to support **regular instruction**, demonstrating the game's versatility for both **structured lessons and in-class free time**. We also provided contact information and, where scheduling permitted, established **recurring classroom visits**. Additional educators were reached through **workshops and conferences** hosted by The Children's Initiative, where *InvestQuest* was demonstrated in group settings and distributed to participating programs. Our team followed up individually to offer **additional games** or in-person instruction to support the **launch of their financial literacy initiatives**.

VI. CLOSING THE PROJECT

A. EVALUATION OF KEY METRICS

Classroooms	Access	Support	Households
Presented to **29** Elementary School Classrooms	Reached **47,500+** Students	Empowered **319** Educators	Provided **524** Games to Households
Goal exceeded by **190%**	Goal exceeded by **850%**	Goal exceeded by **1495%**	Goal exceeded by **424%**

Classroooms

Our first key metric was to introduce *InvestQuest* to 10+ elementary school classrooms, in order to introduce critical financial literacy skills early on, and contribute towards our other three goals. Our team presented to a current **total of 29** 4th, 5th, 6th grade elementary school classrooms largely located in the Del Mar Union School District. We initially **utilized our connections** with our former elementary school teachers to gain an initial foothold from which word-of-mouth, continued outreach to administrators and PTA, and our positive reputation **resulted in expansion.**

Access

Our second key metric was to reach 5,000 students through schools, libraries, and partnerships. This goal was exceeded through **extensive community outreach** and key **collaborations with organizations**, including The Children's Initiative, San Diego Public Libraries, and Diversify our Narrative. Through our partnership with The Children's Initiative, *InvestQuest* has been implemented and distributed across expanded learning programs **throughout San Diego** including numerous YMCAs, Boys and Girls Clubs, and school districts with a reach of **over 47,500 students and counting!**

Support

Our third key metric was to empower 20 educators with tools to overcome teaching barriers. Our team exceeded this goal through **presentations and workshops** at the San Diego Expanded Learning Consortium and stand-alone training with expanded learning staff including teachers, youth program directors, and administrators. Each conference and training session ended with the staff member receiving a copy of *InvestQuest* to **bring back to their programs**, as well as the option to purchase a classroom package to **supply their entire program**.

Households

Our fourth key metric was to provide games to 100 families, fostering interactive **at-home learning away from digital devices.** Our team exceeded this by distributing and selling games to a total of 524 families. Our team utilized **selling channels online**, funneling potential customers from social media platforms (Instagram and Nextdoor mainly) to our website. We also utilized **in-person promotions** for school parents and educator-adjacents. Our team sold *InvestQuest* at all events, providing students and educators with flyers in case they were interested in playing within their household.

Key Metrics Effectiveness

Project effectiveness was measured through satisfaction surveys administered to students, parents, and educators following engagement with MoneyMind Games across different settings, including at-home use after purchase, school classrooms, library events, and conferences. Using Likert scales ranging from 1 (very unsatisfied) to 5 (very satisfied), average satisfaction scores of **4.91 for students, 4.83 for parents, and 4.86 for educators** demonstrate consistently high approval of both the product and the services provided. These benchmarks reflect strong engagement, perceived educational value, and overall effectiveness across all target market groups.

B. LESSONS LEARNED

LESSON 1

Direct Engagement

An initial challenge we faced was a **lack of responses** when reaching out to local schools. In our first batch of emails to 30 teachers, we received just one response. As a team, we decided it would be most effective to **visit school front offices in-person**, where spoke with the staff, showcasing our product and leaving behind flyers. By directly speaking with schools and district officials, we **significantly increased our engagement** with teachers and classrooms. This approach helped us schedule our first classroom presentations, which continued to grow in number through word-of-mouth among teachers, while also giving us **invaluable experience and strengthening our reputation.**

LESSON 2

Managing Inventory

After purchasing our first batch of 50 games, we **sold out of games faster than expected**. While this showed major market need and strengthened our confidence in our product, it would take us at least three weeks to secure our next batch of new games. The pause between our first and second batch of product **halted** our momentum and prevented us from scheduling certain presentations and events we would have otherwise been able to participate in. This experience taught us to ensure that a batch must be re-ordered after half of the previous batch had been fulfilled. This strategy has helped us **stay on top** of our inventory management, and **prevented potential hiccups.**

LESSON 3

Lesson Adaptation

In our first classroom presentations, we quickly realized that students' **understanding of financial literacy was less than we had anticipated**. Many students were unfamiliar with terms such as "stocks," and **lacked a strong understanding** for the concept of money. In order to tackle this, we simplified our presentations and defined financial concepts in **more kid-friendly** and relatable forms. By highlighting the connections between students' lives and the stock market, they were able to **retain information better** and understand how stock prices increase or decrease. This strategy was crucial in library presentations, where the ages of students varied significantly.

C. RECOMMENDATIONS FOR FUTURE PROJECTS

Future Project Scope

Looking towards the future, MoneyMind Games' key priority is **to bring fun, engaging financial literacy education to schools and households across the United States**. We hope to take our initiative from Southern Californian elementary school classrooms and afterschool programs to even more communities as financial illiteracy and unengaging education persist. Our team aims to focus more on social media marketing, partnerships with nationwide education programs, and building a team of motivated students, including branches across the United States. Furthermore, we aim to incorporate recurring visits to classrooms, increasing retention among students and exposing them to even more crucial financial literacy concepts.

MARKETING *BANKIT!*

Our team plans to market *BankIt!* **building on the successful framework** used for *InvestQuest*. We have already reached out to previous elementary school educators who facilitated *InvestQuest* presentations within their classrooms. By **training educators through County Office of Education initiatives**, *BankIt!* will also benefit from trusted, educator-led implementation. This not only strengthens credibility but drives organic word-of-mouth marketing across classrooms, schools, and districts as we open distribution with **broader county-level rollout.**

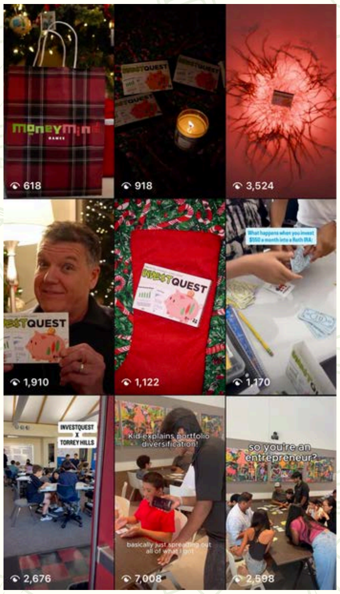
LAUNCHING AN APP

In order to expand our initative nationwide, our team is motivated to **develop an app for both *InvestQuest* and *BankIt!***. Our app will help increase both nationwide and international presence, making financial literacy education accessible to all socioeconomic backgrounds. Features of our app will include language translation, a card scanning function to deepen understanding through real-life applicability, and daily lessons and quizzes to reinforce financial literacy concepts.

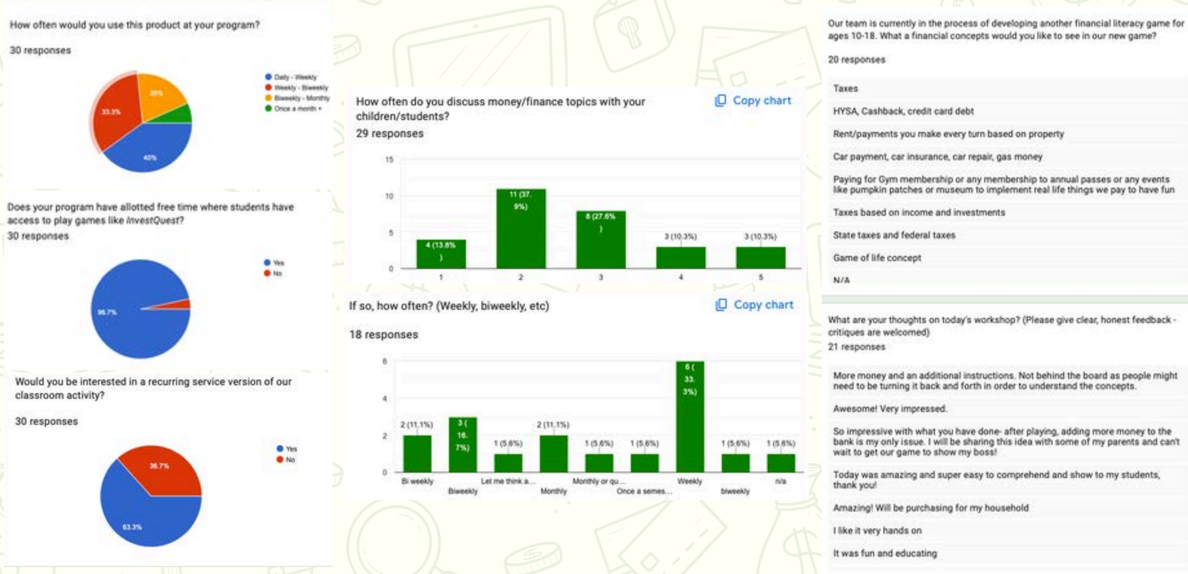
VII. BIBLIOGRAPHY

1. S&P Global. S&P Global Financial Literacy Survey. 2014, Global Financial Literacy Excellence Center, https://gflec.org/wp-content/uploads/2015/11/3313-Finlit_Report_FINAL-5.11.16.pdf
2. TIAA Institute & Global Financial Literacy Excellence Center. (2025). *2025 TIAA Institute–GFLEC Personal Finance Index: Financial literacy remains stagnant as generational gaps widen* [Report]. https://gflec.org/wp-content/uploads/2025/05/2025_05_29_PFIN-Index-Release_FINAL.pdf
3. American Bankers Association & Morning Consult. (2025, March). *Survey: Most Americans agree that financial concepts should be taught in high school and would have benefited from earlier financial education* [Survey results]. Morning Consult. https://www.aba.com/news-research/analysis-guides/americans-financial-literacy
4. National Training Laboratories. (n.d.). *Learning Pyramid: Principles of learning and retention*. The Peak Performance Center. https://thepeakperformancecenter.com/educational-learning/learning/principles-of-learning/learning-pyramid/
5. Petersen Hastings. (2023). *The Financial Literacy Crisis in America 2023 Report* (p. Summary). https://petersenhastings.com/wp-content/uploads/The-Financial-Literacy-Crisis-in-America-2023-Report.pdf

VIII. APPENDIX

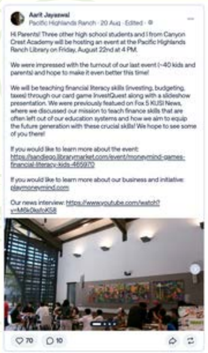


Reels grid from our Instagram: @moneymindgamesofficial



Quantitative and qualitative responses from a survey administered to 30 educators and Expanded Learning program staff at our first conference

General, multi-purpose flyer (adjusted for specific events)



Promotional Nextdoor post for library event

InvestQuest trifold rules sheet (also available at playmoneymind.com)

MoneyMind Games' two TV features on Fox5 KUSI News

1st Place at International UDC Capital Cup