

Broke Academy Implementation Plan

Phase 1

1. Recruitment

September 2022 – January 2023

- Through October broker newsletter
- Develop Recruitment Advertisement – NLT 9 SEP
- OIC office has shown interest in helping promote the program – Jeff Baughman
- Comms meeting with Shawana to develop a recruitment plan – 9/12 @ 1:30
 - Social Media
 - Corporate site
 - Local newsprint? Want newspapers and what is the cost?
 - Other Ideas
- HR input – Gerard 9/7@1:30
 - What agreements are needed and when should the students sign them?
- Compliance input – JoAnna 9/8@9:00
 - What agreements are needed and when should the students sign them?
- Finance Meeting – Addy 9/13
 - Review Budget
 - How to access funds
- Enrollment Centers – Prep EC's to the concept in OCT OE prep meeting – Date TBD
- TAC members – Ask TAC members to be on interview panel OCT, DEC (?), JAN meetings.
- Develop interview questions and interview panel composition – NLT 15 JAN

2. Candidate Selection

February 2023

- Panel selection – NLT 3 FEB
- WAHBE Producer Team input – On going
- Conduct Candidate interviews – 13 thru 17 FEB
- Final selection – NLT 22 FEB
- Notify students selected NLT 24 FEB

Phase 2

3. First Class Orientation

March 2023

- In person and remote meetings
 - WAHBE Mission and Overview
 - Broker Academy Orientation
 - Individual insurance market

4. Attend remote insurance course Mid-March 2023

(TBD depending on course start dates)

- In person classes are available however limited

5. WA Disability Licensing Test April

- Prepare for first time failures
- Peer study or WAHBE Staff assisted

6. WAHBE Insurance courses May – July

- Implicit Bias Training / DEI training courses – instructor TBD
- Medicare / MA/MAPD/PDP and Medicare Supplements - instructor TBD
- Building a book of business - instructor TBD
- Advanced *Healthplanfinder* training - instructor TBD
- Using interpreter services - instructor TBD
- Working for an agency or creating your own agency - instructor TBD

Phase 3

7. Internships with EC's and WAHBE Staff July – October

- Enhanced user course
- Orientation to the Navigator Program
- Working in the producer in box
- Setting in on WAHBE staff meetings

8. Open Enrollment November – January

- Actively selling in their communities
- Regular check ins with WAHBE Producer Program
- Guidance and mentorship from Enrollment Centers and WAHBE Staff

Phase 4

9. Second Year

January

Recruitment process starts

Second year Academy student selection

Continuation of internship program

Enrollment in Community College business course