Strategy Committee Meeting

November 9, 2021

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Public Comment

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Vote

Review and Approval of Minutes

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Broker Academy

Desired Outcome

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Desired Outcome

Access Health CT will be known as a trusted and knowledgeable resource for all things related to health insurance for brokers and consumers in the state of Connecticut.

Furthermore, AHCT will become a learning institution for the aspiring and experienced broker community. We will provide opportunities and inroads into the health insurance industry for **individuals from historically underserved communities who** may not have otherwise had the opportunity or exposure to this industry or professions therein.

An increase of brokers whose origins and target market are in historically underserved communities **will play a part in offsetting the health disparity experienced by historically marginalized communities**.

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Broker Academy Update Agenda

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Broker Academy

Timeline

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Timeline*

CALENDAR YEAR 2022		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Recruitment	**Community-Based Organization Recruitment**	▓	▓	▓									
	Mentor Recruitment	▓	▓	▓									
	Candidate Recruitment			▓	▓	▓							
Training & Development	**First Day of Class**						▓						
	In-Person or Virtual Classes						▓						
	Pre-Licensing Certificate						▓						
	Self Study						▓	▓					
	Pre-Licensing Exam							▓					
Placement	**Apprenticeship**								▓	▓	▓		
	Placement										▓		
	Open Enrollment											▓	▓

*Tentative

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Broker Academy

**Community Engagement
& Recruitment**

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Recruitment: Community Engagement

Outreach and partnerships with community-based organizations will connect candidates to Access Health CT and the broker network.

To support shared efforts, Access Health CT will create:
- **Sponsorships that enable organizations with shared-goals to support this effort in a collaborative nature**
- **Printed and digital promotional materials for targeted outreach efforts**

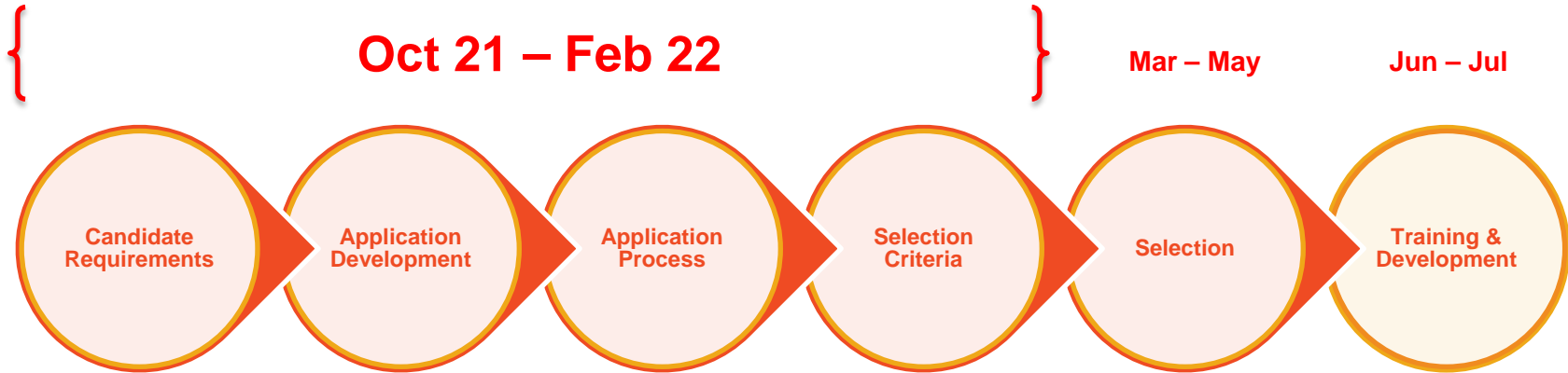**Nonprofits**   **Navigators**   **Faith-based organizations**   **Agencies**   **Staffing Firms**   **Community Schools & Colleges**   **Brokers**

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Recruitment: Application Process

Oct 21 – Feb 22

Mar – May

Jun – Jul

Candidate Requirements → **Application Development** → **Application Process** → **Selection Criteria** → **Selection** → **Training & Development**
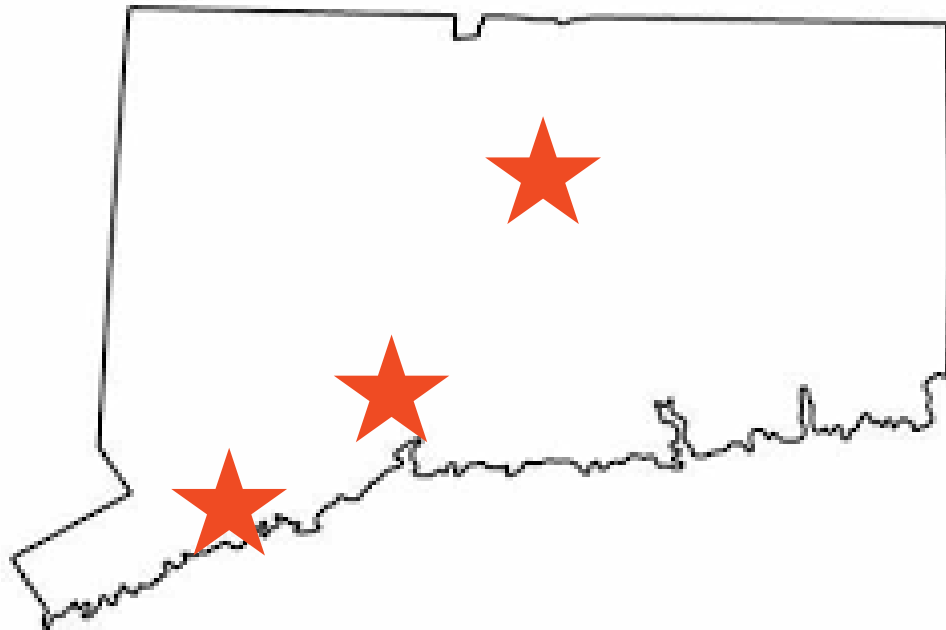
- **Qualifications**
- **Digital and paper applications**
- **Web and email application integration**
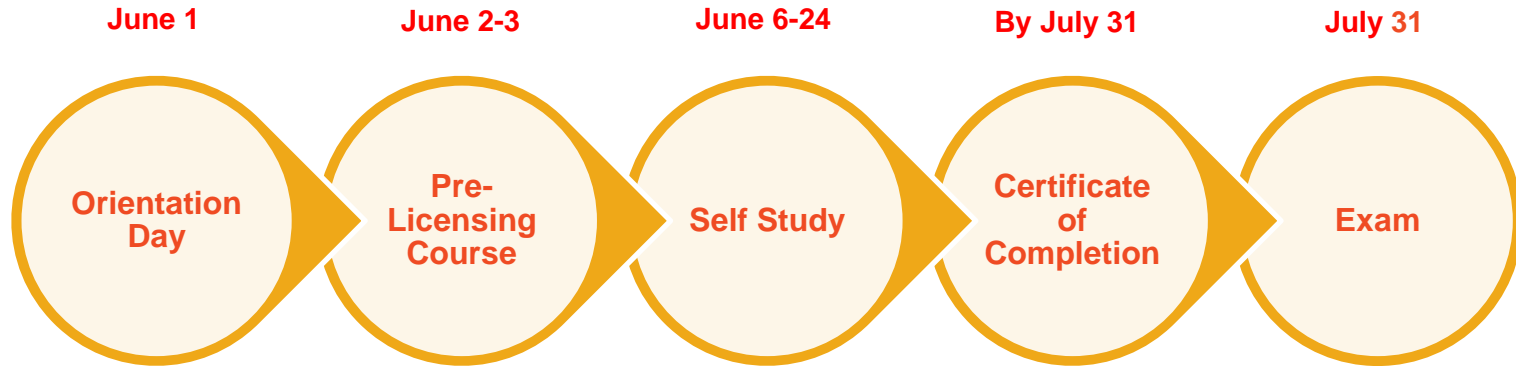- **Committee review**
- **Interviews**
- **Acceptance/Denial**

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Broker Academy

Training & Development

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Training & Development: Locations

1. **Bridgeport**
2. **Hartford**
3. **New Haven**

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Training & Development: Process

June 1   **June 2-3**   **June 6-24**   **By July 31**   **July 31**

Orientation Day → **Pre-Licensing Course** → **Self Study** → **Certificate of Completion** → **Exam**

- **Orientation training presentation**
- **Class schedule**
- **Pre-licensing courses & education vendor**
- **Broker certification**
- **Apprenticeship**

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Training & Development: Testing/Licensing

July 31   **July**   **July**   **Aug – Oct**

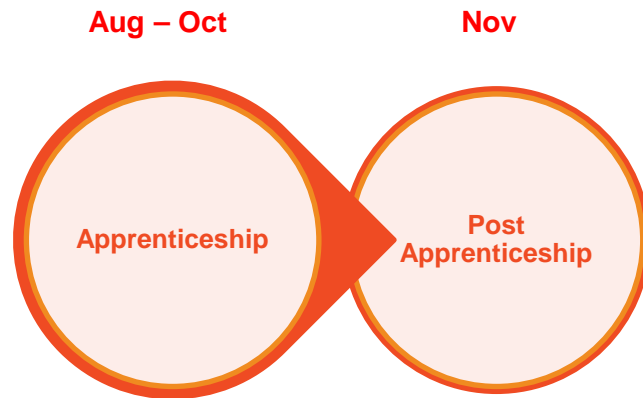**Exam** → **License** → **Broker Certification** → **Placement**
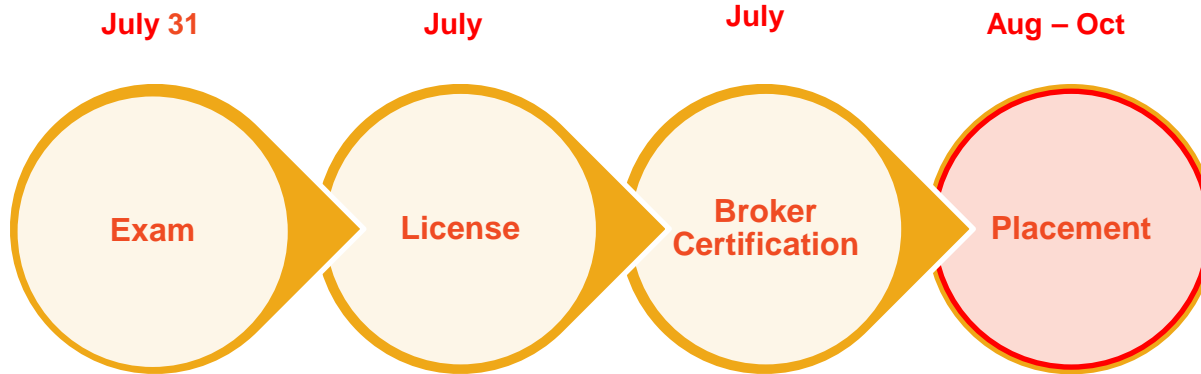
- **Exams provided by CT Insurance Department certified examination center**
- **Online or in-person**
- **Minimum passing score = 70%**
- **Technology support (refurbished laptops)**
- **Stipend**

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Broker Academy

Placement

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Placement

Aug – Oct

Nov

Apprenticeship

Post Apprenticeship

- **Broker mentors**
- **Goal: 90-day program**
- **In place to support Open Enrollment 10**

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Q&A

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Adjournment

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Appendix

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High-Level Project Plan

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High-Level Project Plan

WHAT	HOW	WHO	POTENTIAL CHALLENGES	EST. COMPLETION
How to contact the team	Create a separate email • Inbox can be sent to all team members for management	IT		11/2021
Better website visibility	• Add Broker section to Health Equity Page (as opposed to creating a new page) • BA Blog post for main AHCT website (linked to HE webpage)	IT/Marketing		12/2021
Advertising	Create a flyer for distribution (digital and printed) • Utilize Navigator locations to promote as well	Marketing HE&O		1/2022
Public Presentations	Pitch deck	M+H		
Processing Applications	Create "google form" for application Linked to HE webpage	HE/IT		1/2022
	Develop Candidate Selection Criteria	TEAM		
	Define Program Requirements	TEAM		
	Interview Questions Acceptance Letter Rejection Letter	TEAM		

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High-Level Project Plan

TRAINING	Orientation: Get books, General overview	Marketing / SHOP / HE&O	POTENTIAL CHALLENGES	June 1, 2022
	Applicants Self-Study for 3 weeks			
	Pre-licensing courses are provided by A.D. Banker & Company in many different formats: Classroom web classes online courses, All courses are cross-referenced with the exam content outline.	AD Banker		3 Day Course June 27, 2022
	Licensing exams are provided by Pearson VUE	Pearson VUE		July 2022
	Apply for License	NIPR		July 2022
	AHCT Training- 1 week for our Broker Certification	AHCT Training		August 2022
PLACEMENT	90 Day Apprenticeship Develop Criteria for Broker Mentors • List of Responsibilities/Expectations • Schedule for Apprenticeship • Placement during OE	SHOP/Deb		August to October 2022

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Detailed Project Plan

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Detailed Project Plan

% Complete	Task Name	Duration	Start	Finish	Actual Start	Actual Finish	Resource Names
27%	⊿ Creating AHCT Broker Academy	183 days?	Mon 9/20/21	Wed 6/1/22	Mon 9/20/21	NA	
100%	⊿ Pre-work for Broker Academy	20 days	Mon 9/20/21	Fri 10/15/21	Mon 9/20/21	Fri 10/15/21	Tammy, Caroline & John
100%	Define AHCT Broker Academy Mission, Purpose and Vision	15 days	Mon 9/20/21	Fri 10/8/21	Mon 9/20/21	Fri 10/8/21	Caroline & John,Tammy
100%	Develop Strategic Framework - Draft	11 days	Mon 9/20/21	Mon 10/4/21	Mon 9/20/21	Mon 10/4/21	Caroline & John,Tammy
100%	Finalize Strategic Framework - Approval	15 days	Mon 9/27/21	Fri 10/15/21	Mon 9/27/21	Fri 10/15/21	Caroline & John,Tammy
29%	⊿ Define Financial Requirements	32 days	Fri 10/1/21	Mon 11/15/21	Fri 10/1/21	NA	Caroline & John,Tammy
85%	Identify and itemize costs and present to James for approval	11 days	Fri 10/1/21	Fri 10/15/21	Fri 10/1/21	NA	Caroline & John,Tammy
0%	Develop Financial Model	11 days	Mon 11/1/21	Mon 11/15/21	NA	NA	Caroline & John,Tammy
10%	Determine Funding Source	16 days	Mon 10/25/21	Mon 11/15/21	Mon 10/25/21	NA	Caroline & John,Tammy
64%	⊿ Define Legal Requirements	12 days	Mon 11/15/21	Tue 11/30/21	Fri 10/15/21	NA	Caroline & John,Tammy
100%	Vet the program overview through Legal	12 days	Fri 10/15/21	Mon 11/1/21	Fri 10/15/21	Mon 11/1/21	Caroline & John,Tammy
25%	Vet the selection process through Legal	22 days	Fri 10/15/21	Mon 11/15/21	Fri 10/15/21	NA	Caroline & John,Tammy
100%	Vet the Marketing materials through Legal	12 days	Fri 10/15/21	Mon 11/1/21	Fri 10/15/21	Mon 11/1/21	Caroline & John,Tammy
32%	⊿ Define Technology Requirements	60 days	Mon 12/6/21	Fri 2/25/22	Fri 10/15/21	NA	Caroline & John,Tammy
50%	⊿ Develop Technology Strategy	20 days	Mon 12/6/21	Fri 12/31/21	Fri 10/15/21	NA	Caroline & John,Tammy
75%	IT to set aside up to 100 laptops for use during the first Broker Academy and ensuing Apprenticeship	44 days	Fri 10/15/21	Wed 12/15/21	Fri 10/15/21	NA	Caroline & John,Tammy
25%	Develop protocol & instructions for academy students regarding laptops	44 days	Fri 10/15/21	Wed 12/15/21	Fri 10/15/21	NA	Caroline & John,Tammy
50%	IT to create 2 email accounts for IT & Business to receive inquiries & applications regarding the AHCT Broker Academy Program	20 days	Mon 12/6/21	Fri 12/31/21	Mon 12/6/21	NA	Caroline & John,Tammy

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Detailed Project Plan

% Complete	Task Name	Duration	Start	Finish	Actual Start	Actual Finish	Resource Names
0%	◢ Operational elements of laptop provision - clean, prepare and secure laptops	10 days	Mon 2/14/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Develop selection criteria for donation of laptops	10 days	Mon 2/14/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Installation of software on laptops	10 days	Mon 2/14/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Do we provide helpdesk support for the apprentices?	10 days	Mon 2/14/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Do we include additional hardware (mouse, etc…)	10 days	Mon 2/14/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Do we provide hotspots?	10 days	Mon 2/14/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	How long are we supporting their IT needs? (class only? 3 months?, etc…)	10 days	Mon 2/14/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
24%	◢ Define HR / Broker Support Requirements	96 days?	Fri 10/15/21	Fri 2/25/22	Fri 10/15/21	NA	Caroline & John,Tammy
75%	Develop Candidate Selection Criteria	40 days	Fri 10/15/21	Thu 12/9/21	Fri 10/15/21	NA	Caroline & John,Tammy
21%	◢ Candidate Application Process	96 days?	Fri 10/15/21	Fri 2/25/22	Fri 10/15/21	NA	Caroline & John,Tammy
10%	Define distribution of paper applications	90 days	Mon 10/25/21	Fri 2/25/22	Mon 10/25/21	NA	
25%	Define the electronic way for submitting applications	90 days	Mon 10/25/21	Fri 2/25/22	Mon 10/25/21	NA	Caroline & John,Tammy
29%	◢ Develop Candidate Flow Chart	96 days	Fri 10/15/21	Fri 2/25/22	Fri 10/15/21	NA	Caroline & John,Tammy
70%	Develop Academy Application	96 days	Fri 10/15/21	Fri 2/25/22	Fri 10/15/21	NA	Caroline & John,Tammy
25%	Develop Candidate Interview Questions	96 days	Fri 10/15/21	Fri 2/25/22	Fri 10/15/21	NA	Caroline & John,Tammy
0%	Develop Candidate Acceptance Letter	40 days	Mon 1/3/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Rejection Letter Pre-interview	40 days	Mon 1/3/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Rejection Letter Post-Interview	40 days	Mon 1/3/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy

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Detailed Project Plan

% Complete	Task Name	Duration	Start	Finish	Actual Start	Actual Finish	Resource Names
0%	◢ Develop Broker Mentor Strategy	40 days	Mon 1/3/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Develop selection criteria for brokers	40 days	Mon 1/3/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	◢ Develop communication plan for targeted brokers	40 days	Mon 1/3/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Develop list of responsibilites / expectations of broker mentors	40 days	Mon 1/3/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	Identify and Vet Broker that will present on Orientation Day	19 days	Tue 2/1/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
14%	◢ Develop Training Curriculum	90 days	Mon 10/25/21	Fri 2/25/22	Mon 10/25/21	NA	Caroline & John,Tammy
25%	Develop Orientation Training Presentation	90 days	Mon 10/25/21	Fri 2/25/22	Mon 10/25/21	NA	Caroline & John,Tammy
0%	Identify and secure training company (A&D Banker)	19 days	Tue 2/1/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
10%	Develop Academy Class Schedule (dates)	90 days	Mon 10/25/21	Fri 2/25/22	Mon 10/25/21	NA	Caroline & John,Tammy
0%	Develop and schedule after-class study sessions	19 days	Tue 2/1/22	Fri 2/25/22	NA	NA	Caroline & John,Tammy
0%	◢ Define Marketing Requirements	23 days	Tue 3/1/22	Thu 3/31/22	NA	NA	Caroline & John,Tammy
0%	◢ Develop Marketing Strategy for Academy	10 days	Tue 3/1/22	Mon 3/14/22	NA	NA	Caroline & John,Tammy
0%	Include this program in ads for OE as well? (radio, TV, Social media?)	10 days	Tue 3/1/22	Mon 3/14/22	NA	NA	Caroline & John,Tammy
0%	Develop Marketing Materials for Academy	10 days	Mon 3/14/22	Fri 3/25/22	NA	NA	Caroline & John,Tammy
0%	◢ Define Outreach Requirements	23 days	Tue 3/1/22	Thu 3/31/22	NA	NA	Caroline & John,Tammy
0%	◢ Develop Outreach Strategy	10 days	Tue 3/1/22	Mon 3/14/22	NA	NA	Caroline & John,Tammy
0%	Develop communicaton strategy regarding this program's service to underserved communities	10 days	Tue 3/1/22	Mon 3/14/22	NA	NA	Caroline & John,Tammy
0%	Define Value Proposition for Mentor Brokers	10 days	Tue 3/1/22	Mon 3/14/22	NA	NA	Caroline & John,Tammy
0%	Implement Outreach Strategy	13 days	Tue 3/15/22	Thu 3/31/22	NA	NA	Caroline & John,Tammy

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