



## **Appendix A2**

### **WORK PROCESS SCHEDULE**

**AND**

### **RELATED INSTRUCTION OUTLINE**

**FOR THE OCCUPATION OF:**

**GENERAL INSURANCE ASSOCIATE**

**(USDOL EXISTING OCCUPATION: GENERAL INSURANCE ASSOCIATE)**

**O\*NET-SOC CODE: 43-9041.01 RAPIDS CODE: 2040CB**



## Appendix A

**WORK PROCESS SCHEDULE  
GENERAL INSURANCE ASSOCIATE  
(Existing Title: GENERAL INSURANCE ASSOCIATE)  
O\*NET-SOC CODE: 43-9041.01 RAPIDS CODE: 2040CB**

This schedule is attached to and a part of these Standards for the above identified occupation.

### **1. APPRENTICESHIP APPROACH**

Time-based                       Competency-based                       Hybrid

### **2. TERM OF APPRENTICESHIP**

The term of the occupation shall be defined by the attainment of all competencies of the position, which would be reasonably expected to occur within 1 to 2 years of OJL full-time, or 3 years part-time, supplemented by the minimum recommended 144 hours of related instruction during the apprenticeship. The sponsor may recognize prior-learning achievements or demonstration of competencies to account for related instruction or OJL hours.

### **3. RATIO OF APPRENTICES TO JOURNEYWORKERS**

The apprentice to journeyworker ratio is: 2 Apprentice(s) to 1 Journeyworker.

### **4. APPRENTICE WAGE SCHEDULE**

Apprentices shall be paid a progressively increasing schedule of wages. Apprentices starting wage shall be a minimum of \$10.25 per hour. The minimum wage of a journeyworker is \$13.64 per hour which will be paid at the completion of the apprenticeship. The minimum wage rate may be adjusted based on regional wage scales.

**Term:**

1 <sup>st</sup> Period	Year 1 (0-12 months)	\$10.25/hr
2 <sup>nd</sup> Period	Year 2 (13-24 months)	\$11.27/hr
3 <sup>rd</sup> Period	Year 3 (25- 36 months)	\$12.40/hr
Final	Apprenticeship Completion (36+ months)	\$13.64/hr

Periodic review and evaluation of the apprentice's on-the-job learning and related technical instruction will be conducted in alignment with the wage schedule established. All wage increases are merit-based.

### **5. PROBATIONARY PERIOD**

Every apprentice selected for apprenticeship will serve a probationary period of 500 hours



## **6. QUALIFICATIONS AND SELECTION PROCEDURES**

Please see page 20.



**WORK PROCESS SCHEDULE**  
**GENERAL INSURANCE ASSOCIATE**  
**(Existing Title: GENERAL INSURANCE ASSOCIATE)**  
**O\*NET-SOC CODE: 43-9041.01 RAPIDS CODE: 2040CB**

**Description:** All apprentices in this General Insurance Associate program will pursue a concentration. Three (3) concentrations are available: Insurance Generalist, Underwriting, and Claims. Insurance Generalists are focused on internal and external communication, data analysis, and business analysis. Underwriters work with their team to interpret and explain information regarding worker's compensation policies, premium and regulatory and legislative issues to stakeholders resolving any questions/issues as they come up. Claims Representatives frequently communicate with stakeholders to resolve insurance claims.

**On-The-Job Training:** Apprentices will receive training in the various work experiences listed below. The order in which this training is given will be determined by the flow of work on the job and will not necessarily be in the order listed.

Ratings are:

- (4) Exceeds All Expectations (Advanced)
- (3) Meets & Exceeds Some Expectations (Proficient)
- (2) Meets Expectations Consistently (Emerging)
- (1) Meets Some Expectations (Novice)
- (0) Not Applicable (No Skill)

4. Exceeds All Expectations (Advanced): Consistently exceeds performance standard established for the time in position. Achieves results above and beyond what is required. Extends themselves in their roles to exceed personally and as a team to achieve exceptional results.

3. Meets & Exceeds Some Expectations (Proficient): Employee not only meets all expectations in a fully satisfactory way but exceeds some of the objectives.

2. Meets Expectations Consistently (Emerging): Meets the performance standards established for time in position. Handles routine tasks & some unexpected situation with the usual amount of supervision. Can continue to develop with coaching, advanced training or more experience

1. Meets Some Expectations (Novice): Occasionally meets some of the objectives related to this goal but does not meet others in a fully satisfactory way. This performance level generally indicates the need for additional coaching, training or other plan for performance improvements.

0. Not Applicable (No Skill): Training in this competency has not yet begun.

Apprentices need to at least receive an average ranking of "2" across all applicable competency categories when evaluated at each of their reviews during the apprenticeship in order to be considered for any merit-based wage increases. Apprentices need to receive a "2" or better in each competency in order to complete the apprenticeship.



## Apprentice Competency Evaluation

INSURANCE GENERALIST COMPETENCIES	Rating	Supervisor Sign-off	Date
<p><b>Customer Service/ Service Orientation</b>  <i>Understands principles and processes for providing customer and personal services. This includes assessing customer needs, meeting quality standards for services, and keeping customers informed.</i></p> <ul style="list-style-type: none"> <li>• Addresses internal and external customers in a polite and friendly manner. Uses email and voicemail proficiently and consistently with internal customers.</li> <li>• Meets basic customer needs.</li> <li>• Identifies the proper employee to help with more complex needs.</li> <li>• Independently meets customer needs.</li> <li>• Uses email and voicemail proficiently and consistently with external customers.</li> </ul>			
<p><b>Process Analysis and Application</b>  <i>Understands the process required for specific work tasks, determines if and how the process is working and how changes in conditions, operations, and the environment will affect outcomes.</i></p> <ul style="list-style-type: none"> <li>• Describes internal processes core to business operations and their functions within a system.</li> <li>• Describes how these processes interact.</li> <li>• Interacts with and works within processes core to business operations.</li> <li>• Owns simple processes core to business operations.</li> <li>• Identifies and reacts to issues within processes that need to be changed.</li> <li>• Fully integrates into the system and understands impacts of their process on other processes.</li> </ul>			
<p><b>Business Communication</b>  <i>Tells a story in a compelling way. Develops arguments to persuade someone to their side. Influences.</i></p> <ul style="list-style-type: none"> <li>• Develops written and oral descriptions of factual issues in a concise and effective manner.</li> <li>• Identifies tools that could be used in communication.</li> <li>• Develops insights and communicates them effectively to supervisor.</li> <li>• Uses various communication tools with direction from supervisor.</li> <li>• Clearly articulates problems and solutions in written and oral forms.</li> </ul>			



<ul style="list-style-type: none"> <li>• Presents solution sets.</li> <li>• Independently selects the appropriate communication tool for the job.</li> </ul>			
<p><b>Data Literacy</b>  <i>Reads, aggregates, distills, and disseminates internal and external data in structured formats for use in assigned tasks.</i></p> <ul style="list-style-type: none"> <li>• Describes different business operations reports and how to access them.</li> <li>• Accesses data from different business operations reports.</li> <li>• Knows where to find data for assigned tasks.</li> <li>• Runs reports for internal and external purposes.</li> </ul>			
<p><b>Data Analysis</b>  <i>Analyzes and processes complex data for core business operations. Identifies the underlying principles, reasons, and facts of data sets. Breaks down information or data into separate parts.</i></p> <ul style="list-style-type: none"> <li>• Performs routine data entry tasks to support supervisor.</li> <li>• Exhibits basic navigation of Excel; understands the structure and purpose of a cell.</li> <li>• Independently performs data entry tasks.</li> <li>• Employs formatting, conditional formatting, and simple formulas in Excel.</li> <li>• Employs formatting, conditional formatting, and simple formulas in Excel.</li> <li>• Acts as a steward of data; prepares data with minimal errors for use by colleagues and supervisors.</li> <li>• Accesses data from databases in support of business needs.</li> <li>• Writes formulas in Excel and creates pivot tables.</li> </ul>			
<p><b>Data Communication</b>  <i>Creates and distributes reports, dashboards, visualizations, and presentations to communicate business performance.</i></p> <ul style="list-style-type: none"> <li>• Understands and navigates business management tools.</li> <li>• Explains how and where elements sit within business management tools.</li> <li>• Opens and interacts with reports at a basic level.</li> <li>• Creates visualizations, dashboards, and presentations with assistance and direction provided by supervisor.</li> <li>• Downloads reports to communicate business performance.</li> </ul>			



<ul style="list-style-type: none"> <li>• Creates visualizations, dashboards, and presentations independently for assigned tasks.</li> <li>• Creates reports to communicate business performance.</li> </ul>			
<p><b>Business Systems Analysis</b>  <i>Determines how a system should work and how changes in conditions, operations, and the environment will affect outcomes.</i></p> <ul style="list-style-type: none"> <li>• Describes systems core to business operations and their functions.</li> <li>• Describes interactions between different systems.</li> <li>• Works within these systems but may lack understanding of impacts from one system to another.</li> <li>• Describes impacts and relationships on the business ecosystem.</li> <li>• Describes how decisions and actions impact other systems.</li> <li>• Works proficiently within systems.</li> </ul>			
<p><b>Interpersonal Communication</b>  <i>Discovers information that isn't publicly available, shifts another person's perspective, and makes convincing presentations.</i></p> <ul style="list-style-type: none"> <li>• Addresses internal and external customers in a polite and friendly manner.</li> <li>• Sets up and proactively manages voicemail and email.</li> <li>• Communicates in a professional and helpful manner in all forms (in-person, written, and phone).</li> <li>• Communicates effectively with managers to meet their needs.</li> <li>• Leverages calendars to schedule meetings with managers and project teams.</li> <li>• Collaborates with and supports peers rather than competing with them.</li> <li>• Volunteers for projects.</li> <li>• Recognizes when peers have less capacity and speaks up to offer their assistance.</li> <li>• Presents as honest and admits and accepts mistakes.</li> <li>• Accepts critical feedback as a growth opportunity.</li> <li>• Advocates for self when help is needed.</li> </ul>			



INSURANCE UNDERWRITER COMPETENCIES	Rating	Supervisor Sign-off	Date
<p><b>Insurance principles and practice</b>  <i>Knows and understands the core principles of insurance and can apply to operations.</i></p> <ul style="list-style-type: none"> <li>• Describes what insurance is and what it is used for, the different lines of insurance that are available, what is necessary to acquire insurance, and what can affect different rates and premiums.</li> <li>• Describes the regulatory agencies that affect different lines of insurance.</li> <li>• Describes how different departments work together within the organization.</li> <li>• Applies knowledge of the applicable lines of insurance, organizational roles, and regulatory roles to insurance operations.</li> </ul>			
<p><b>Insurance products and services</b>  <i>Understands the range of insurance products and services available in the market and how to meet client needs.</i></p> <ul style="list-style-type: none"> <li>• Describes the products and services offered as an industry standard.</li> <li>• Describes the products and services offered that are specific to the organization.</li> <li>• Details the different channels (e.g., agents, walk-ins) for obtaining business.</li> <li>• Identifies the differences between standard and special products and services offered.</li> <li>• Demonstrates an awareness of industry competitors.</li> <li>• Selects applicable standard and special products and services to issue policies and packages.</li> <li>• Provides education on applicable products and services both internally and to clients.</li> </ul>			
<p><b>Underwriting process</b>  <i>Documents information in order to underwrite new risks, alterations, renewals and/or cancellations in an accurate and timely manner.</i></p> <ul style="list-style-type: none"> <li>• Describes different roles and levels within the underwriting discipline and the products and services offered.</li> <li>• Describes the life of a policy.</li> <li>• Researches and documents facts or information required to evaluate risk.</li> <li>• Assists with underwriting new and renewal business.</li> <li>• Communicates with assigned team members to process policy requests.</li> </ul>			





<ul style="list-style-type: none"> <li>• Underwrites standard new and renewal business.</li> <li>• Communicates with different departments to process policy requests.</li> <li>• Determines if a policy price is adequate for the potential risk.</li> <li>• Manages an underwriting work flow.</li> </ul>			
<p><b>Regulatory Compliance</b> <i>Adheres to regulatory requirements in all facets of operations.</i></p> <ul style="list-style-type: none"> <li>• Describes the role of regulatory agencies and provides examples of their roles for relevant line(s) of insurance.</li> <li>• Demonstrates understanding of business practices and state laws relevant to the industry.</li> <li>• Operates within applicable laws (e.g., Workers' Compensation), organizational filings, and regulatory filings.</li> <li>• Articulates how different regulatory agencies and organizational functions influence underwriting.</li> </ul>			
<p><b>Data Literacy</b> <i>Reads, aggregates, distills, and disseminates internal and external data in structured formats for assigned tasks.</i></p> <ul style="list-style-type: none"> <li>• Describes different underwriting reports and how to access them.</li> <li>• Accesses data provided by internal reporting, regulatory reporting, and industry reporting and assists with data entry.</li> <li>• Runs reports for internal and external purposes.</li> <li>• Aggregates and compiles data provided by internal reporting, regulatory reporting, and industry reporting.</li> <li>• Distills and disseminates data provided by internal reporting, regulatory reporting, and industry reporting to determine and explain analyses of pricing.</li> <li>• Analyzes data to identify industry trends.</li> </ul>			

<b>CLAIMS REPRESENTATIVE COMPETENCIES</b>	<b>Rating</b>	<b>Supervisor Sign-off</b>	<b>Date</b>
<p><b>Customer Service/ Service Orientation</b> <i>Understands principles and processes for providing customer services. This includes customer needs assessment, meeting quality standards for services, approaching conversations with empathy, managing</i></p>			



<p><i>conflict, and keeping customers informed.</i></p> <ul style="list-style-type: none"><li>• Seeks support for building rapport and resolving any conflict.</li><li>• Asks clarifying questions and engages with customers in a transactional manner.</li><li>• Listens to the customer and does not make them repeat themselves.</li><li>• Interacts with mostly internal stakeholders, in a highly supported manner.</li><li>• Uses clear and concise verbal and written communication to build rapport and resolve conflict.</li><li>• Asks clarifying questions, practices active listening, and demonstrates empathy when needed.</li><li>• Meets basic customer needs and identifies the proper employee to help with more complex needs.</li><li>• Communications are highly structured and pre-planned, with low-risk internal and external stakeholders.</li><li>• Interacts and communicates with customers to maintain rapport and deescalate conflict.</li><li>• Responds to customers with appropriate emotions including demonstrating empathy and sympathy, when needed.</li><li>• Takes ownership of the customer relationship and independently meets customer needs.</li><li>• Communications with all stakeholders are less structured.</li></ul>			
<p><b>Insurance Claims Principles and Practice</b> <i>Knows and understands the core principles of insurance and can apply to operations.</i></p> <ul style="list-style-type: none"><li>• Describes what insurance is and what it is used for.</li><li>• Describes how different departments work together within the organization.</li><li>• Differentiates between which factors can affect the compensability of claims.</li><li>• Describes the regulations and rules that govern claims-related decision making.</li><li>• Narrates the claims process from the start to the close of a claim.</li><li>• Demonstrates knowledge of compensability factors and appropriate steps for when a loss has occurred and a claim has been accepted.</li></ul>			



<ul style="list-style-type: none"> <li>• Leverages knowledge of the claims process to serve as a partner in decision-making.</li> </ul>			
<p><b>Claims Handling</b>  <i>Uses company processes and state policies to facilitate claims processing for policyholders by gathering or requesting information, managing records, corresponding with stakeholders to manage and resolve open claims, identifying compensability red flags, and approving payments.</i></p> <ul style="list-style-type: none"> <li>• Reviews claim documents for accuracy and completion.</li> <li>• Reviews claim documents for accuracy and completion and requests needed information from stakeholders at multiple touchpoints throughout the life of the claim.</li> <li>• Initiates communication with stakeholders.</li> <li>• Examines completed documents for red flags related to compensability and escalates issues accordingly.</li> <li>• Arranges care and manages documents and records appropriately.</li> <li>• Approves payments on bills related to a claim.</li> <li>• Both initiates and responds to communication with and requests from stakeholders.</li> </ul>			
<p><b>Confidential Information Handling</b>  <i>Ensures the privacy of client data and confidential situations at all times.</i></p> <ul style="list-style-type: none"> <li>• Articulates the importance of upholding confidentiality standards and the consequences for not upholding them.</li> <li>• Upholds confidentiality standards and shows extreme caution when handling sensitive information.</li> <li>• Follows data protection protocols (ex. locks their computer, encrypts data as appropriate).</li> <li>• Upholds confidentiality standards independently and without referencing policy documents.</li> <li>• Identifies risks to confidentiality and makes suggestions for how to further protect confidentiality.</li> </ul>			
<p><b>Claims Systems</b>  <i>Effectively uses the claims system to perform essential job functions.</i></p> <ul style="list-style-type: none"> <li>• Accesses records and documents for review in appropriate claims handling systems.</li> <li>• Manages documents and records in appropriate claims handling systems.</li> </ul>			



<ul style="list-style-type: none"> <li>• Accesses, manages, and modifies documents, forms, and records in appropriate claims handling systems.</li> </ul>			
<p><b>Data Literacy</b> <i>Reads, aggregates, distills, and disseminates internal and external data to perform essential job functions.</i></p> <ul style="list-style-type: none"> <li>• Describes different business operations reports (e.g., customer service, Human Resources, core operations for manufacturing) and how to access them.</li> <li>• Accesses data from different business operations reports.</li> <li>• Knows where to find data for assigned tasks.</li> <li>• Runs reports for internal and external purposes.</li> </ul>			
<p><b>Data Analysis</b> <i>Analyzes and processes complex data for core business operations. Identifies the underlying principles, reasons, and facts of data sets. Breaks down information or data into separate parts.</i></p> <ul style="list-style-type: none"> <li>• Performs routine data entry tasks to support supervisor.</li> <li>• Exhibits basic navigation of Excel; understands the structure and purpose of a cell.</li> <li>• Reviews data to identify patterns.</li> <li>• Independently performs data entry tasks.</li> <li>• Employs formatting, conditional formatting, and simple formulas in Excel.</li> <li>• Reviews data to identify patterns, trends, anomalies, and outliers.</li> <li>• Writes formulas in Excel and creates pivot tables.</li> <li>• Acts as a steward of data; prepares data with minimal errors for use by colleagues and supervisors.</li> <li>• Analyzes data and trends to inform decisions within the scope of their role.</li> </ul>			
<p><b>Detail Orientation</b> <i>Accepts accountability for consistent accuracy in all tasks.</i></p> <ul style="list-style-type: none"> <li>• Prioritizes important details to capture and can differentiate between important and unimportant details.</li> <li>• Frequently asks questions to ensure appropriate level of detail.</li> <li>• Accepts constructive feedback.</li> <li>• Actively seeks feedback on work to ensure that it is error-free.</li> <li>• Produces work that is error-free through proofreading and self-correction.</li> </ul>			



<ul style="list-style-type: none"> <li>• Customizes level of detail provided in communication to the specific audience.</li> </ul>			
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The above on-the-job-learning (OJL) work process competencies are intended as a guide. It need not be followed in any particular sequence, and it is understood that some adjustments may be necessary in the amount of time spent for different work experience. In all cases, the apprentice is to receive sufficient experience to make them fully competent and use good workmanship in all work processes, which are a part of the trade. In addition, the apprentice shall be fully instructed in safety requirements of the position.

### **Apprenticeship Competencies – Career Readiness**

In addition to mastering all the essential technical competencies outlined in the work processes, an apprentice must consistently demonstrate growth and proficiency in the following career readiness competencies to complete the apprenticeship.

Apprentices will be evaluated in these competencies semi-annually, and the supervisor will initial and date the accomplishment of the career ready competency at each review.

Ratings are:

- (4) Exceeds All Expectations (Advanced)
- (3) Meets & Exceeds Some Expectations (Proficient)
- (2) Meets Expectations Consistently (Emerging)
- (1) Meets Some Expectations (Novice)
- (0) Not applicable (No Skill)

4. Exceeds All Expectations (Advanced): Consistently exceeds performance standard established for the time in position. Achieves results above and beyond what is required. Extends themselves in their roles to exceed personally and as a team to achieve exceptional results.

3. Meets & Exceeds Some Expectations (Proficient): Employee not only meets all expectations in a fully satisfactory way but exceeds some of the objectives.

2. Meets Expectations Consistently (Emerging): meets the performance standards established for time in position. Handles routine tasks & some unexpected situation with the usual amount of supervision. Can continue to develop with coaching, advanced training or more experience

1. Meets Some Expectations (Novice): occasionally meets some of the objectives related to this goal but does not meet others in a fully satisfactory way. This performance level generally indicates the need for additional coaching, training or other plan for performance improvements.

0. Not Applicable (No Skill): Training in this competency has not yet begun.

Apprentices need to at least receive an average ranking of “2” across all applicable competency categories when evaluated at each of their reviews during the apprenticeship in order to be considered for any merit-based wage increases. Apprentices need to receive a “2” or better in each competency in order to complete the apprenticeship.



ENTREPRENEURIAL SKILLS	Rating	Supervisor Sign-off	Date
<b>Critical Thinking/Problem Solving</b> <ul style="list-style-type: none"> <li>• Recognize that problems can be identified, and possible solutions can be generated</li> <li>• Define the problem using a variety of strategies</li> <li>• Make connections between information gathered and personal experiences to apply and/or test solutions</li> </ul>			
<b>Creativity / Innovation</b> <ul style="list-style-type: none"> <li>• Demonstrate curiosity, imagination and eagerness to learn more</li> <li>• Build on personal experience to specify a challenging problem to investigate</li> <li>• Engage in novel approaches, moves, directions, ideas and/or perspectives</li> </ul>			
<b>Inquiry</b> <ul style="list-style-type: none"> <li>• Recognize and describe cause-and-effect relationships and patterns in everyday experiences</li> <li>• Investigate to form hypotheses, make observations and draw conclusions</li> <li>• Test hypotheses/prototype with planned process for getting feedback</li> </ul>			
<b>Risk Taking</b> <ul style="list-style-type: none"> <li>• Demonstrate a willingness to try new things</li> <li>• Demonstrate flexibility, imagination and inventiveness in taking on tasks and activities</li> <li>• Innovate from failure, connect learning across domains and recognize new opportunities</li> </ul>			

PERSONAL SKILLS	Rating	Supervisor Sign-off	Date
<b>Self-Management / Self Awareness</b> <ul style="list-style-type: none"> <li>• Accurately recognize one's own emotions, thoughts and values and how they influence behavior</li> <li>• Appropriately express one's own emotions, thoughts and values and identify how they influence behavior</li> <li>• Assess personal strengths and limitations, with a well-grounded sense of confidence, optimism and a 'growth mindset'</li> </ul>			
<b>Self-Direction</b> <ul style="list-style-type: none"> <li>• Recognize personal characteristics, preferences, thoughts and strengths</li> </ul>			



<ul style="list-style-type: none"> <li>Pursue opportunities to engage and learn interests</li> <li>Apply knowledge to set goals, make informed decisions and transfer to new contexts</li> </ul>			
<b>Adaptability / Flexibility</b> <ul style="list-style-type: none"> <li>Recognize emotional response to ideas that differ from one's own</li> <li>Regulate reactions to differing perspectives</li> <li>Look for and value in different perspectives expressed by others</li> </ul>			
<b>Perseverance / Resilience</b> <ul style="list-style-type: none"> <li>Resist distractions, maintain attention, and continue the task at hand through frustration or challenges</li> <li>Set goals and develop strategies to remain focused on learning goals</li> <li>Focus on learning goals by employing motivation and familiar strategies for engagement and evaluate progress, making necessary changes to stay the course</li> </ul>			

<b>CIVIC/INTERPERSONAL SKILLS</b>	<b>Rating</b>	<b>Supervisor Sign-off</b>	<b>Date</b>
<b>Collaboration / Teamwork</b> <ul style="list-style-type: none"> <li>Recognize how personal actions have had a positive or negative impact on others with feedback as needed</li> <li>Recognize how members of a community rely on each other, considering personal contributions as applicable</li> <li>Follow a process identified by others to help generate ideas, negotiate roles and responsibilities, and respects consensus in decision making</li> </ul>			
<b>Communication</b> <ul style="list-style-type: none"> <li>Articulate personal strengths and challenges using different forms of communication to express oneself</li> <li>Consider purpose, formality of context and audience, and distinct cultural norms when planning content, mode, delivery and expression</li> <li>Establish goals for communication and plan out steps accordingly</li> </ul>			
<b>Global / Cultural Awareness</b> <ul style="list-style-type: none"> <li>Compare attitudes and beliefs as an individual to others</li> <li>Identify and explain multiple perspectives (cultural, global) when exploring events, ideas and issues</li> </ul>			



<ul style="list-style-type: none"> <li>Plan and evaluate complex solutions to global challenges that are appropriate to their contexts using multiple disciplinary perspectives (such as cultural, historical and scientific)</li> </ul>			
<b>Ethics</b> <ul style="list-style-type: none"> <li>Takes great care with organizational data</li> <li>Does not disclose any kind of personal or sensitive organizational information; understands that all data is confidential</li> <li>Demonstrates honesty and integrity in all interactions. If an error is made, prioritizes minimal impact to the organization over their own reputation</li> </ul>			

<b>PROFESSIONAL SKILLS</b>	<b>Rating</b>	<b>Supervisor Sign-off</b>	<b>Date</b>
<b>Task/Time Management</b> <ul style="list-style-type: none"> <li>Articulate task requirements and identify deadlines</li> <li>Develop and utilize basic task and time-management strategies effectively</li> <li>Demonstrate task-management attributes associated with producing high-quality products including the abilities to: 1) Work positively and ethically 2) Manage time and projects effectively 3) Multi-task 4) Clearly communicate with others</li> </ul>			
<b>Self-Advocacy</b> <ul style="list-style-type: none"> <li>Appropriately express a range of emotions to communicate personal ideas/needs</li> <li>Ask questions to develop further personal understanding</li> <li>Demonstrate confidence in sharing ideas/feelings</li> </ul>			
<b>Work Ethic</b> <ul style="list-style-type: none"> <li>Complete tasks with ongoing support</li> <li>Seek clarity on tasks and needs occasional support</li> <li>Demonstrate skill in assigned tasks and completes with little or no support</li> </ul>			

<b>ACADEMIC SKILLS</b>	<b>Rating</b>	<b>Supervisor Sign-off</b>	<b>Date</b>
<b>Core Academic Foundation</b> <ul style="list-style-type: none"> <li>Begins to use math and literacy skills to inform work</li> <li>Uses math and literacy skills to perform job tasks with frequent checks by supervisor</li> </ul>			





<ul style="list-style-type: none"><li>Independently and consistently use math and literacy skills to perform tasks (with occasional checks for quality)</li></ul>			
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**RELATED INSTRUCTION OUTLINE**  
**GENERAL INSURANCE ASSOCIATE**  
**(Existing Title: GENERAL INSURANCE ASSOCIATE)**  
**O\*NET-SOC CODE: 43-9041.01 RAPIDS CODE: 2040CB**

**Related instruction** - This instruction shall include, but not be limited to, at least 144 hours during the apprenticeship. The curriculum is defined as a variety of classes, around which the exams and projects are based. By defining the related instruction this way, all competencies required of the students are met, through project work.

<b>RELATED INSTRUCTION</b>	<b>Approximate Hours</b>
CareerWise Apprenticeship Bootcamp	24
CareerWise Professional Development	8
Macroeconomics	45
Microeconomics	45
Business Communication	45
Intro to Business	45
Accounting Principles	60
<b>Total Hours of Related Instruction</b>	<b>272</b>

**COURSE DESCRIPTIONS**

**CareerWise Apprenticeship Bootcamp (16 hours)**

Introduction to career-readiness to prepare students for working in a professional environment.

Topics may include:

- Soft skills development
- Workplace etiquette and expectations
- Professional communication
- Time management
- Goal setting
- Self-advocacy and emotional intelligence
- Money management
- Stress management
- Supervisor interaction preparation
- Growth mindset and training plans
- Building strong relationships
- Feedback and tough conversations
- Workplace conflict



- Higher education planning
- LinkedIn and resume development
- Financial planning
- Workplace Safety and Ergonomics

### **CareerWise Professional Development (8 hours)**

Ongoing professional skills development courses. Topics may include:

- Managing strengths and weaknesses
- Professional communication
- Networking
- Time management

### **Macroeconomics (45)**

Focuses on the study of the national economy, emphasizing business cycles and long-run growth trends. Explores how macroeconomic performance is measured, including Gross Domestic Product and labor market indicators. Examines the saving-investment relationship and its relationship to Aggregate Supply and Aggregate Demand. Discusses money and banking, international trade, fiscal and monetary policy. Explores the macroeconomic role of the public sector.

### **Microeconomics (45)**

Studies the firm, the nature of cost, and how these relate to the economy as a whole. Analyzes economic models of the consumer, perfect competition, monopoly, oligopoly and monopolistic competition. Explores economic issues including market power, population growth, positive and negative externalities, income distribution, poverty and welfare, discrimination, and international economic interdependence.

### **Business Communication (45)**

Emphasizes effective business writing and covers letters, memoranda, reports, application letters, and resumes. Includes the fundamentals of business communication and an introduction to international communication.

### **Intro to Business (45)**

Focuses on the operation of the American business system. Covers fundamentals of the economy, careers and opportunities, marketing, management, production, governmental regulations, tools of business and social responsibilities.

### **Accounting Principles (60)**

This course introduces accounting principles for understanding the theory and logic that underlie procedures and practices for business organizations. Major topics include the accounting cycle for service and merchandising companies, internal control principles and practices, notes and interest, inventory systems and costing, and plant and intangible asset accounting.



## **SELECTION PROCEDURES**

Selection Procedure:

**a. *Alternative Selection Methods***

- B. Sponsor will schedule an interview and evaluation session. All applicants who have met the minimum qualifications and have submitted the required documents will be notified of the date, time, place and/or method for the conduct of the interview. The recruiter/interviewer will record the questions asked and the general nature of the applicant's answers during this interview process. The sponsor's selecting official will evaluate each applicant interviewed on like factors taking into account the information on the application and required documents, as applicable using an Interview Summary Form.
- C. Upon completing all interviews and analyzing the applicants' qualifications the sponsor's selecting official will make a determination using the annotated Interview Summary Forms. Applicant(s) with the highest evaluation will be selected first. The selected applicant(s), depending on the number of vacancies offered by the advertised announcement, will be offered employment in order of evaluation and upon acceptance of employment will be placed in the apprenticeship program.
- D. Selected applicants must respond to the offer of employment within 48 hours of notice of selection. If applicant(s) do not responded within the period specified, the sponsor will move past their name to the next applicant in the pool. Applicants passed over will be contacted by the sponsor by email and/or phone to determine if the applicants are still interested. If no response is received in fifteen (15) working days from this notice, the applicant's name will be removed from the pool.
- E. After all offers of employment have been extended and accepted by the selectee(s), as applicable, the remaining applicants in the pool of eligibles will be notified of their non-selection under this vacancy announcement. The non-selection notice will also include instructions on how they can apply for any future openings.
- F. Qualified applicants remaining in the pool of eligibles will be kept on file for a period of two (2) years, unless the applicant is removed from the pool by their own written request or following failure to respond to an offer of employment.



- G. During the two (2) year period, to update their status in the pool of eligibles, applicants who feel that their qualifications have improved since their original placement in the pool may submit evidence of such additional experience and/or training by updating their candidate profile and request reevaluation or by simply submitting a new application for subsequent vacancy announcements.
- H. The sponsor may select apprentices from an eligibility pool of the workers already employed by the program sponsor or by the sponsor's established promotion policy. The sponsor adopting this method of selecting apprentices shall establish goals for the selection of minority and female apprentices, unless the sponsor concludes, in accordance with the provisions of 29 CFR §§ 30.4(d), (e), and (f) that it does not have deficiencies in terms of underutilization of minorities and/or women (minority and nonminority) in the apprenticeship of journeyworker occupations represented by the program. Employer must attach an outline of their in-house selection process with their Employer Acceptance Agreement.

***b. Selection from pool of current employees***

The sponsor may select apprentices from an eligibility pool of the workers already employed by the program sponsor or by the sponsor's established promotion policy. The sponsor adopting this method of selecting apprentices shall establish goals for the selection of minority and female apprentices, unless the sponsor concludes, in accordance with the provisions of 29 CFR §§ 30.4(d), (e), and (f) that it does not have deficiencies in terms of underutilization of minorities and/or women (minority and nonminority) in the apprenticeship of journeyworker occupations represented by the program. Employer must attach an outline of their in-house selection process with their Employer Acceptance Agreement.