

WSIA's U40 Leadership Certificate

Value Proposition for U40 Members:

- To create a means to recognize those U40 members that have shown a dedication to both individual growth and to bettering the industry through leadership efforts and volunteer involvement;
- To engender tangible leadership skills through educational sessions both at the U40 Annual Meeting and encouraging attendance to other recognized courses;
- To encourage regular/repeated participation in U40, WSIA, and industry activities/events;
- To prepare U40 members to be ambassadors for the industry.

Key considerations when designing the certificate:

- Must be able to clearly identify value of certification program to both U40 members and their parent companies;
- Eligible criteria for certification must encourage growth in insurance knowledge, industry involvement, and/or leadership experience;
- Individuals must complete credits/hours in each of the target criteria to ensure recipients' dedication to the target intent;
- Certificate must be attainable, but qualifications must ensure that recipients have shown a commitment over time;
- Prestige of certificate should be both initially identified and subsequently maintained. Any change to the eligibility criteria must be done with consideration for the long-term impact of past and future certificate holders.

Target recipients:

- The certificate process is available to all U40 members active and in good standing.
- *Individuals who previously received the legacy UFO certificate and are active U40 members in good standing are eligible to complete the new certificate process.*

Criteria:

- 1. Registered U40 Member**
- 2. Attend at least one U40 Annual Meeting**
- 3. WSIA Education** (*The applicant must complete 40 total hours of WSIA education to qualify.*)
 - a. Attend Surplus Lines Management Program =20 hours
 - b. Attend Marcus Payne Advanced School =20 hours
 - c. Attend Executive Leadership School =20 hours
 - d. Attend Effective Sales Coaching Educational Program =8 hours
 - e. Attend 8 hours of WSIA University sessions
 - f. Call-In on 3 or more WSIA Webinars =1 hour each
 - g. Attend U40 Annual Meeting Leadership Track Session =3-4 hours each
 - i. first year goes toward standalone requirement, subsequent years can count toward education requirement

- h. Consultative Selling and Negotiations =8 hours
 - i. WSIA Annual Marketplace Education =1 hour per session
 - j. U40 International Summit =20 hours
- 4. Leadership Role** (*One interaction = 1 credit, applicant must complete a total of 3 credits.*)
- a. Present or moderate an education / webinar session
 - b. Contribute on a U40 Newsletter topic
 - c. Participate on a WSIA Committee
 - d. Mentor at the U40 Annual Meeting (*requires 2 years of attendance*)
 - e. Former WSIA Intern
 - f. Serve on the U40 Board
- 5. Industry or Community Volunteer** (*One interaction = 1 credit, applicant must complete a total of 5 credits.*)
- a. Attend a U40 charity event
 - b. Individually contribute to a U40 charity event
 - c. PAC Contributor (*2 or more years*)
 - d. Participate in a Campus Event
 - e. Contribute a community service article to the U40 Newsletter