



***THE SOCIETY OF INSURANCE TRAINERS & EDUCATORS (SITE)***

***APPLICATION FOR THE  
INSURANCE TRAINING PROFESSIONAL DESIGNATION (ITP)***

**Send Completed Application to:**

**Society of Insurance Trainers and Educators (SITE)**

6635 W. Happy Valley Rd., Suite A104, #444

Glendale, AZ 85310

(623) 547-6401 – phone

(623) 547-6814 – fax

[ed@insurancetrainers.org](mailto:ed@insurancetrainers.org)

**Submission Deadlines:**

**May 1st** for consideration at the June Board meeting

**September 1st** for consideration at the Fall Board meeting

**January 1st** for consideration at the Winter Board meeting



## SITE INSURANCE TRAINING PROFESSIONAL

### OVERVIEW

1) Is membership in SITE a requirement for the designation?	Yes
2) What are the overall requirements for the designation?	Requirements: <ul style="list-style-type: none"> <li>• Evidence of insurance knowledge (designation or certification or work experience)</li> <li>• Evidence of training/education knowledge</li> <li>• Evidence of training/education experience</li> <li>• Acceptance of the Code of Ethics</li> </ul>
3) How does one provide evidence of insurance knowledge?	Approved insurance designation/certificate - <b>OR</b> - Accredited insurance/financial services courses at the college level of a minimum of 20 hours - <b>OR</b> - Verification of a minimum of 10 years insurance company experience in core competencies of underwriting, actuarial, accounting, claims; and, for other jobs, please list experience that relates broad insurance knowledge.
4) Is there a minimum number of years of training/education experience required?	5 years as a training/education professional
5) What is the evidence required to show knowledge of training/education?	Approved Train-the-Trainer course completion - <b>OR</b> - Accredited adult education related degree or a closely related field with significant education coursework - <b>OR</b> - Accredited education course work of 20 or more semester hours undergraduate or graduate
6) What is the evidence required to show successful insurance training or training experience?	A course outline (including training objectives, training methodology and evaluation process used) <b>AND</b> one of the following: list of recent courses taught/designed; needs assessment conducted; passing ratios for courses taught; or sample of evaluations for programs conducted.
7) Is there a SITE Code of Ethics?	Yes
8) Is there a continuing education and/or professional development requirement?	This is not required but strongly encouraged
9) Is there an application fee?	\$175.00 One time fee
10) Are there any renewal fees?	No, but ongoing membership in SITE is required
11) Are there any recertification requirements?	No
12) Are letters of recommendation from clients or employers required?	No
13) To apply, do you need a sponsor?	No
14) How is the designation awarded?	The designation is awarded by majority vote to approve the application by SITE Board of Directors
15) Who maintains and sanctions the ITP?	It is sanctioned and maintained by SITE

## MEMBERSHIP REQUIREMENT

The applicant must be a member in good standing in SITE to apply for the INSURANCE TRAINING PROFESSIONAL (ITP) designation.

Applicants for the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation who are not SITE members may submit an application to join SITE concurrent with the INSURANCE TRAINING PROFESSIONAL application or separately when submitting the application.

Applicant must maintain SITE membership to maintain the designation.

## INSURANCE INDUSTRY KNOWLEDGE REQUIREMENT

To be eligible for the designation, the applicant must show proof of having received an insurance designation or certificate. Please provide proof of having been awarded an insurance certificate/designation (examples are, but not limited to: CPCU, CLU, CIC, ARM, FLMI, AU or AIC designations or INS certificate)

- OR -

An alternative to a designation is proof of insurance/financial services courses at the college level (minimum of 20 hours). Proof of such courses would include a transcript.

- OR -

A resume detailing a minimum of 10 years of insurance company experience showing broad insurance/financial services industry knowledge. The resume should describe job experiences in core competencies such as claims, underwriting, accounting, actuarial. For other jobs, list experience that relates to broad insurance industry knowledge.

## TRAINING/EDUCATION KNOWLEDGE

To be eligible for the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation, the applicant must show proof of substantial training knowledge as evidenced by successful completion of SITE's Train-the-Trainer program or other SITE board approved Train-the-Trainer program or earning an accredited degree in adult education or a closely related field with significant education coursework, or 20 or more semester hours in an undergraduate or graduate education degree program.

## PROFESSIONAL TRAINING/EDUCATION PRACTICE

### I. EVIDENCE OF TRAINING/EDUCATION PRACTICE

The applicant must include evidence of successful training/education practice. To show this, please include course outline (including training/learning objectives, training methodologies, and evaluation process used) **AND** one of the following: a list of courses taught during the most recent 3 years; program evaluation summaries from 3 past programs; needs assessments conducted; or passing ratios for AICPCU or other licensing or designation programs taught.

All materials will be returned and will not be used for any purpose except showing proof of the applicant's professional training/education ability. All materials should be non-proprietary models.

### II. LENGTH OF TIME AS A TRAINING/EDUCATION PROFESSIONAL

This must include a minimum of five years as a training/education professional. To show such experience, the applicant should include a resume showing the years of experience.

## SITE INSURANCE TRAINING PROFESSIONAL CODE OF ETHICS

To uphold and advance the honor and dignity of the training profession within the insurance industry, and in keeping with high standards of ethical conduct, **I pledge that I will:**

- Through my professional conduct increase the competence and prestige of the training profession and the insurance industry.
- Treat students, co-workers and customers with respect and dignity at all times regardless of knowledge, skills or demeanor.

- Protect the privacy of students, the insuring public, co-workers and clients unless disclosure serves a compelling professional purpose or is required by law.
- Strive for excellence in the profession by maintaining and enhancing my own knowledge and skills.
- Endeavor to aid the professional development of others in the profession.
- Maintain the highest degree of integrity in my professional work and avoid conflicts of interest and the appearance of conflict.
- Comply with intellectual property laws including United States and International Copyright laws.
- Honestly represent my skills, knowledge and actions in all aspects of my work including but not limited to student interactions and job applications.
- Act in professional matters as a faithful agent or trustee for my employer or clients.

### **CONTINUING EDUCATION AND PROFESSIONAL DEVELOPMENT**

Although not a requirement for maintaining the designation, it is our expectation that recipients of the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation will continue their professional development and engage in continuing education on an ongoing basis. Based on an honor system, SITE will not require submission of annual documentation of these endeavors, but does reserve the right to periodically survey SITE members who have received the INSURANCE TRAINING PROFESSIONAL (ITP) designation to verify ongoing continuing education and professional development.

### **APPLICATION FEE**

A one-time application fee of \$175.00 must accompany all applications for the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation. The fee will be fully refunded in the event an application cannot be approved, and the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation bestowed upon the applicant.

Once the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation is bestowed, all fees are fully non-refundable. In addition to offsetting costs, SITE will endeavor to utilize funds invested by applicants to continually raise the value of the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation by public recognition and awareness efforts and adherence to quality standards.

### **AWARDING THE DESIGNATION**

The Society of Insurance Trainers and Educators Board of Directors, or its designees, will carefully review each application for the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation. A majority vote of the SITE Board of Directors affirming the application is required before any SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation is bestowed.

Certificates will be awarded following the Board's decision. All recipients will be honored at the next SITE annual conference following the Board's vote.

### **SANCTIONED DESIGNATION USE**

The Society of Insurance Trainers and Educators, upon bestowing the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation will sanction and upon request verify professional use of the INSURANCE TRAINING PROFESSIONAL (ITP) designation. Sanction uses include, but are not limited to, use on letterhead, business advertisement, business card, and other reasonable and customary uses of professional applications consistent with good taste and decorum. The Society of Insurance Trainers and Educators reserves the right to revoke sanctioned use of the INSURANCE TRAINING PROFESSIONAL (ITP) designation in the event its use by any recipient diminishes its dignity and worth, a determination to be solely made by the Society of Insurance Trainers and Educators Board of Directors.



**THE SOCIETY OF INSURANCE TRAINERS & EDUCATORS  
(SITE)**

**APPLICATION FOR THE  
INSURANCE TRAINING PROFESSIONAL DESIGNATION (ITP)**

**Applicant Information:** (please print)

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

E-mail address \_\_\_\_\_

Phone Number \_\_\_\_\_

**MEMBERSHIP REQUIREMENT**

**Check one:**

<input type="checkbox"/> I am a SITE member	<input type="checkbox"/> I am not currently a SITE member, but I have completed a SITE membership application.
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**INSURANCE INDUSTRY KNOWLEDGE REQUIREMENT**

**Check one:**

<input type="checkbox"/> I have attached a copy of my insurance designation(s).	<input type="checkbox"/> I have attached a copy of my college transcript(s) showing 20 hours in insurance/financial services courses.
<input type="checkbox"/> I have attached a copy of my degree(s) in insurance.	<input type="checkbox"/> I have attached a resume verifying 10 years insurance experience and detailing my insurance industry knowledge.

**TRAINING/EDUCATION KNOWLEDGE**

**Check one:**

<input type="checkbox"/> I have completed the SITE Train-the-Trainer program and request that SITE confirm the completion of said program. Date or location: _____	<input type="checkbox"/> I have completed a Train-the-Trainer program and attached copies of certificates or other evidence of completion along with a copy of the program outline.
<input type="checkbox"/> I have earned an accredited degree(s) in adult education and have attached a copy of my degree(s) or my grade transcript(s).	<input type="checkbox"/> I have earned 20 or more semester hours in accredited education course work in undergraduate or graduate courses. I have attached a copy of my grade transcript(s) or degree(s).

**PROFESSIONAL TRAINING/EDUCATION PRACTICE**  
**I. EVIDENCE OF TRAINING/EDUCATION PRACTICE**

**I have included a copy of a course outline that I taught and/or designed that includes:**

- Course training/learning objectives
- Training techniques/methodologies used
- Course evaluation process used

**I have also included (check at least one):**

<input type="checkbox"/> A list of courses I taught and/or designed during the most recent three years.	<input type="checkbox"/> Summary copies of student evaluations from three programs I taught.
<input type="checkbox"/> Passing ratio reports for three AICPCU or similar courses I taught.	<input type="checkbox"/> Copies of Needs Assessments I conducted.

**II. LENGTH OF TIME AS A TRAINING/EDUCATIONAL PROFESSIONAL**

I have included a resume showing a minimum of 5 years experience as a training/education professional.

**APPLICATION FEE AND MATERIALS**

I have attached the \$175.00 application fee in the form of a check made payable to SITE.

I have included all required documentation (8.5 x 11, single-sided, unbound copies only) with my application.

**SITE INSURANCE TRAINING PROFESSIONAL CODE OF ETHICS**

I have read and agree to abide by and conduct myself according to the SITE INSURANCE TRAINING PROFESSIONAL (ITP) Code of Ethics.

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**APPLICANT'S SIGNATURE**

**DATE**

**INSURANCE TRAINING PROFESSIONAL APPLICATION AGREEMENT**

In applying for the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation, I declare that I have met the requirements as outlined in the application. I agree to allow the Society of Insurance Trainers and Educators to use my name and affiliation in publications regarding the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation. I agree that the Society of Insurance Trainers and Educators can solely determine that misuse of the designation has or is occurring, and such determination may result in suspension or forfeiture of the designation. I promise to use the SITE INSURANCE TRAINING PROFESSIONAL (ITP) designation only as approved by the Society of Insurance Trainers and Educators.

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**APPLICANT'S SIGNATURE**

**DATE**

**QUESTIONS? CONTACT [ED@INSURANCETRAINERS.ORG](mailto:ED@INSURANCETRAINERS.ORG)**