

# Trainer Code of Practice

## 1. Introduction

The Institute of Customer Service is the independent, professional membership body for customer service in the United Kingdom. This Code of Practice for Trainers sets out the standards of conduct, behaviour and competence to which those who have been approved to deliver Institute courses are expected to adhere. Where an individual is approved to deliver Institute courses as a Trainer, they agree that such approval is conditional upon their acceptance to be bound by the requirements of this Code.

## 2. Breach

Evidence of a breach of this Code by Trainers will in most cases trigger a supporting review between The Institute and the Trainer in question. Trainers will be supported towards compliance and The Institute will provide advice where necessary to enable requirements to be met. However where a Trainer repeatedly breaches the requirements of this Code or fails to respond to Institute correspondence relating to such a breach, The Institute reserves the right to withdraw approval or accreditation.

## 3. Scope

This Code applies to all Institute approved Trainers in the course of their delivery of any Institute course. These Trainers include:

- a) In house organisational Institute approved facilitators
- b) Institute professional development facilitator
- c) Approved preferred suppliers
- d) Management qualifications tutors
- e) Academy learning and development consultants

## 4. Review

This Code will be reviewed on an annual basis.

## 5. The Code of Practice for Trainers

As an Institute approved Trainer you agree that you will:

**T1 (In house Trainers only) Ensure that you have the necessary skills and experience to deliver Institute training and where relevant have undertaken the necessary Institute training to be an Institute course facilitator.**

T1G: In order to deliver Institute courses you will need to have completed the approval process either through the Train the Trainer course (delivered by The Institute Academy) or via direct application to The Institute. No individual is permitted to deliver Institute training courses without first having been approved as a Trainer by The Institute. You will need to obtain separate Institute approval for each Institute course you wish to deliver.

**T2 Undertake Continuous Professional Development (CPD) each year in order to keep your professional knowledge and understanding up to date.**

T2G: Continuous Professional Development may be undertaken in a variety of ways, including seminars, conferences, training courses, lectures, peer evaluation and private study of relevant materials such as research journals and articles. It is recommended that you undertake at least 5 hours of Continuous Professional Development (CPD) each year which should comprise a mix of CPD relevant to your:

- skills as a Trainer and;
- customer service knowledge and skills.

You should keep a log of all your CPD activity which may need to be produced or referenced for the purposes of complying with Institute quality assurance processes. The Institute runs a number of relevant fora and events each year capable of constituting CPD for Trainers, the details of which can be found by visiting The Institute website.

**T3 Deliver at least 1 Institute training course per year.**

T3G: Approved Trainer organisations should deliver at least 3 Institute courses per year. You should ensure you individually deliver at least one of these. You should ensure that a record is kept of each course delivered, the names of the learners you have delivered to, number of learners and the date of delivery. If you are working in an organisation which, due to size/learner numbers, delivers less than 3 courses per year you can apply for an exception to this requirement by filling out the Exceptions Request form. Please see the Institute Exceptions Policy [here](#) for more information:

**T4 Only deliver Institute courses as part of organisational in-house training, not for private or corporate financial gain.**

T4G: Institute Trainer approval is usually restricted to the delivery of Institute courses “in house” within your organisation. It does not usually permit you to deliver any Institute course to third party organisations or individuals. However in certain circumstances you can apply to deliver Institute courses to contractors working with your organisation. Such delivery should not be undertaken without prior authorisation from The Institute. Please note it is expressly prohibited by this Code to deliver any Institute course for financial gain.

**T5 Deliver Institute Service Focus courses as a sole facilitator to a recommended minimum of 6 learners and a maximum of 12 learners per course.**

T5G: Institute ServiceFocus courses should not be run for classes of learners numbering less than 6 people. The optimum class size for any Institute course, delivered by one facilitator, is between 8 – 12 learners. Groups of 12 or more learners will need to be facilitated by at least 2 Institute approved facilitators.

**T6 Not use Institute courses as a means to sell other, non-Institute branded training courses or products.**

T6G: Institute courses should be delivered using Institute branded course materials and content. It is important that any non-Institute branded content or materials used during the training period are clearly marked as distinct from Institute materials in order to avoid confusion. Marketing or internal communications relating to non-Institute branded courses should not be combined with that relating to Institute courses.

**T7 Not deliver Institute courses to learners outside of the UK, Ireland or the Channel Islands without first securing written consent to this from The Institute.**

T7G: If you wish to deliver Institute courses to learners outside of the UK you should apply in writing to The Institute providing your details, the course you wish to deliver, the country where you wish to deliver the training and confirmation that:

- you have been quality assured in the UK by The Institute and;
- that training will be delivered in the English language.

You will need written consent from The Institute in response to your request before any training may be delivered outside of the UK. Materials for use outside of the UK should be clearly marked “for international delivery”.

**T8 Deliver Institute courses in accordance with Institute defined course content, guidance and plans.**

T8G: You should ensure that all Institute courses you deliver do not deviate from Institute defined core course content, facilitator guidance, style and branding. You may adapt some of the classroom exercises in order to contextualise to your organisation, environment or particular service however you should ensure that core content remains the same and that only Institute approved and branded core materials are used.

**T9 Comply with all Institute quality assurance processes on request.**

T9G: The Institute reserves the right to contact you for the purpose of quality assuring your performance as a Trainer. Such processes may include (but are not limited to) review of your CPD log, review of a sample of your learner evaluations, service improvement opportunities, professional discussion and/or training observation. You should ensure that you comply fully with all quality assurance processes in order to protect the integrity of your training delivery and Institute courses. A failure to comply with Institute quality assurance processes could result in your Trainer approval being withdrawn.

**T10 Protect the reputation of The Institute and avoid acting in any way which could bring The Institute into disrepute.**

T10G: In the course of delivering training on Institute courses you are a representative of The Institute. Training should be carried out with integrity and in accordance with Institute requirements in order to preserve both your professional reputation and that of The Institute as the national standards body for the field. Examples of behaviour or conduct which could bring The Institute into disrepute include: practices which compromise the safety of learners, unfairness or bias in learning assessments, or behaving in a discriminatory or unfair way. Should The Institute be made aware of behaviour contravening this requirement a full investigation will be conducted and, if proved, your Trainer approval may be withdrawn.

**T11 Ensure that any personal data gathered, held or processed in the course of training delivery, is dealt with in accordance with the provisions of relevant data protection legislation.**

T11G: You are responsible for ensuring that any personal data entrusted to you by learners is properly secured and not disclosed without the permission of the data subject. You should ensure that all training documentation containing personal data (e.g. names) is filed securely and once it is not needed anymore, securely destroyed. For advice and guidance on data protection you may wish to visit the Information Commissioner's Office website.

**T12 Keep proper records of all training you have delivered and ensure that these records are made available on request by The Institute for the purposes of auditing or quality assurance.**

T12G: You should ensure that you keep a record of each Institute training course you deliver including, as a minimum, details of: learner names, course title, delivery date, in course assessment outcome/s.

**T13 Ensure that the details of learners who have completed Institute training you have delivered are provided to The Institute, within 2 months of the date of training delivery, for the purposes of arranging Institute membership.**

T13G: You must ensure that the names and contact email addresses for those learners who have successfully completed a training course you have delivered are sent by email to The Institute within 2 months of the date of training delivery. You should ensure that the email containing your learner names and contact email addresses is sent to The Institute. The title of the email should be "Training Completion Notification".

**T14 Ensure that training is delivered in accordance with equality legislation including the Equality Act 2010.**

T14G: You must ensure that your training delivery takes account of the needs of different learners and that particular protected characteristics are not a barrier to access. For example you should consider the accessibility of the training venue for any physically disabled learners, timing of training for learners with dependents or other caring commitments and any particular dietary requirements (where refreshments are provided). Trainers should be mindful of the requirements of the Equality Act 2010 and other equal opportunities legislation.

**T15 Inform The Institute of any major changes affecting your work as a Trainer, including notifying The Institute when you cease to act as a Trainer.**

T15G: You will need to notify The Institute of any major changes to your circumstances affecting your status as an Institute Trainer. Such changes include:

- Change of employer or job role
- Change of name or contact details
- Ceasing to act as a Trainer (either temporarily or permanently).

**T16 Not copy or re-use Institute training courses or materials for organisations outside the scope of your approval or in relation to courses for which you have not been approved.**

T16G: Course content and all supporting materials belong to The Institute. You should not copy, circulate or plagiarise any of these materials or content for any reason other than delivery of courses for which you have been approved to learners within the organisation names in your trainer approval application.