

# CII trainer accreditation standards

# CIIT trainer accreditation standards

Standard	Description of standard	Trainer accreditation level – examples of evidence		
		Introductory technical trainer	Intermediate technical trainer	Advanced technical trainer
<b>1. Subject knowledge</b>	The accredited trainer has the required level of relevant technical knowledge, experience and qualifications for the training courses they deliver.	Certificate in Insurance/Certificate in Financial Planning or an equivalent relevant qualification.	Diploma in Insurance/Diploma in Financial Planning/ Diploma in Regulated Financial Planning or an equivalent relevant qualification.	Advanced Diploma in Insurance/ Advanced Diploma in Financial Planning or an equivalent relevant qualification.
<b>Evidence</b>		Application form and qualifications certificates.		
<b>2. Financial services sector knowledge</b>	The accredited trainer has practitioner experience and/or financial services sector experience to enable them to understand the business environment e.g. claims, underwriting, risk management, providing financial advice.	1 year industry practitioner experience or 2 years financial services sector experience.	2 years industry practitioner experience or 3 years financial services sector experience.	3 years industry practitioner experience or 4 years financial services sector experience.
<b>Evidence</b>		Application form.		

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<b>3. Training delivery and design</b>	<p>The accredited trainer is able to deliver training to a high standard, can explain technical terminology, understands the learning cycle and can adapt their training delivery to suit the audience needs.</p> <p>The accredited trainer knows how to structure a training programme and can evaluate training.</p>	<p>The trainer is able to deliver training to a consistently high standard, for example, there is active learner participation, the delivery style is varied, technical terminology is clearly explained and the language, pace and style is appropriate for the audience.</p> <p>The learning activities are interactive and designed to respond to delegate ability, learning preference and is suitable for individuals with different protected characteristics.</p> <p>The learning is structured with clear aims and objectives.</p> <p>The learning outcomes are specific and measurable.</p> <p>The trainer is able to identify delegate training needs and delegate progress.</p> <p>The training is evaluated and adjusted if required.</p>		
<b>Evidence</b>		<p>Training observation</p> <p>Training materials/course design information</p> <p>Application form (e.g. training roles and responsibilities)</p> <p>References, delegate feedback, success/pass rates</p> <p>Evaluation feedback.</p>		

# CIJ trainer accreditation standards

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		Introductory technical trainer	Intermediate technical trainer	Advanced technical trainer
<b>4. Planning and organising</b>	<p>The accredited trainer ensures that their training is relevant and up-to-date.</p> <p>The accredited trainer has adequately prepared for the training session and is able to deliver the training within the scheduled timeframe.</p> <p>The accredited trainer has anticipated the potential training needs of delegates and has prepared examples and activities to support the learning.</p> <p>The training is clearly structured with a timed training schedule, breaks and access to facilities.</p>	<p>The trainer uses relevant examples to address delegate training needs and is able to answer delegate questions.</p> <p>The trainer has fully prepared for the training, for example, has sufficient training resources, knowledge of the training course content, structure, format and also the learning activities so that they can direct and support delegates.</p> <p>The trainer is able to deliver the training as scheduled.</p>		
<b>Evidence</b>		<p>Training observation</p> <p>Training schedule, trainer notes</p> <p>Training materials/course design information</p> <p>Training location and facilities arrangements</p> <p>References, delegate feedback</p>		

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<b>5. Professionalism</b>	<p>The accredited trainer is an advocate of professionalism, is committed to their own professional development and proactively seeks to improve their training knowledge and skills.</p> <p>The accredited trainer acts with integrity.</p> <p>The accredited trainer pro-actively undertakes relevant CPD and reflects on their CPD activity.</p> <p>The accredited trainer delivers training which is free from product bias or promotions.</p>	<p>The trainer is reliable, well organised and complies with any record keeping requirements.</p> <p>The trainer is approachable, enthusiastic and is respectful of all stakeholders. The trainer complies with a Code of Ethics.</p> <p>The training is free from bias or inadvertent sales content. The trainer does not make overt appeals for clients or criticise competitors.</p> <p>The trainer is polite and respectful and offers constructive feedback to delegates.</p> <p>The trainer undertakes self review and is proactive about own self development. The trainer ensures that their training and technical knowledge is kept up-to-date and relevant.</p> <p>The trainer reflects on how their CPD activities met their development need and has contributed to their expertise as a trainer.</p>		
<b>Evidence</b>		<p>Application form – member of a professional body and following Code of Ethics</p> <p>Application form – CPD evidence, evidence of ID</p> <p>References, delegate feedback</p> <p>Training observation</p> <p>CPD activities and CPD reflective statement.</p>		