

## **Instructor Training Organisations Guidance to Applicants**

### **Introduction**

The Department for Transport (DfT) is inviting applications from organisations wishing to be recognised as a provider of high quality training and ongoing development services for people delivering National Standard Cycle Training. These organisations will be known as Instructor Training Organisations.

This document describes the application process and requirements that bodies wishing to be recognised as an Instructor Training Organisation will have to meet.

### **Background**

The National Standard for Cycle Training (the National Standard) gives children and adults alike the skills and confidence to ride their bikes safely and well on today's roads. It was designed by leading experts in the fields of road safety and cycling, on similar principles to lessons for motorcycle riders and car drivers, assessing the likely risks and obstacles faced by cyclists. The DfT is committed to the maintenance and development of the National Standard.

The DfT, through Cycling England, promotes Bikeability as the National Standard scheme. All Bikeability schemes have gone through an application process and will in future be monitored through an inspection regime.

Only people who have been through a recognised training course are considered by Government as "qualified" to deliver National Standard / Bikeability training. This extends to people teaching instructors and those wishing to be an assistant at a National Standard training course. Currently these instructor training courses are delivered by bodies known as Instructor Training Providers.

In order to enhance and maintain the quality of instructor training the DfT is implementing a new scheme to recognise organisations that deliver National Standard Instructor training to the required standard. These organisations will be known as Instructor Training Organisations (ITOs).

### **Instructor Training Organisations**

ITOs will be the only bodies recognised by Government as providing training for National Standard Instructor Trainers, Instructors and Assistant Instructors (collectively known as "instructors" throughout this document). Only instructors trained by ITOs will be issued with National Standard Instructor numbers which identify them as providing cycle training that meets the National Standard.

## **Roles and Responsibilities**

The DfT will recognise ITOs that provide a number of services to an acceptable standard. These services include:

- Training of instructor trainers;
- Training of instructors (compulsory);
- Training of assistant instructors; and,
- Membership services for instructors. All ITOs must provide membership services. As a minimum these must include providing opportunities for further development and providing updates on the National Standard for cycle training (compulsory).

ITOs may decide to provide other services such as networking opportunities, training outside of the National Standard (e.g. mountain bike training or bike maintenance) or insurance products<sup>1</sup>. Such services will not be recognised by the DfT and will not be assessed as part of the application to become an ITO.

ITOs will be expected to:

- Train instructor trainers, instructors and assistant instructors in accordance with the courses agreed as part of the assessment of their application;
- Carry out post-course assessments for instructors in line with the process agreed as part of the assessment of their application;
- Agree any changes in the agreed processes, courses or administrative procedures with DfT;
- Provide DfT with details of all people trained by it and in an agreed format within 10 working days of qualification;
- Provide a service to the public to verify the credentials of instructors either trained by it or affiliated to it;
- Membership services for instructors. All ITOs must provide membership services. As a minimum these must include providing opportunities for further development and providing updates on the National Standard for cycle training.
- Provide any monitoring information required by the DfT;
- Comply fully with any audit / re-assessment processes undertaken by the DfT.

Further details on these responsibilities are set out in Annex A - "Roles and Responsibilities of Instructor Training Organisations".

## **The Application Process**

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<sup>1</sup> Please note that the Department for Transport is unable to advise on or verify insurance products or services and they will not form part of the ITO assessment process. We recommend that any organisation intending to provide insurance services should seek professional financial advice.

The application process will take place during an application window which will end on 28 May 2010. The date of any future application windows has not been decided but will be at the discretion of the DfT.

This section explains the application process – that is what all applicants will have to do in order to be considered as an ITO. The application process is being managed by Steer Davies Gleave (SDG) on behalf of the DfT and has three stages:

- Stage 1 - Expression of interest
- Stage 2 - Paper-based application
- Stage 3 - Practical delivery

**Stage 1 - Expressions of Interest (EOI):** all organisations wishing to submit an application must first of all submit an EOI on the EOI form included in the application pack. Applications will not be accepted from organisations who have not submitted the EOI.

The EOI form must be submitted to SDG, at the address given on the form, no later than 17.30 on 26 February 2010.

A briefing meeting will be held on 8 March for those organisations who have submitted an EOI. Places will be limited and will therefore be on a first come first served basis. Further details are set out on the EOI form.

**Stage 2: Paper-based Application:** all applicants must complete the ITO application form included in the ITO application pack. Applications will be accepted from 1 March until 28 May 2010. Applications received before the 1 March or after the 28 May will not be accepted. The application should clearly demonstrate:

- A clear commitment to delivering high quality cycle training;
- That the applicants courses are compliant with the National Standard for Cycle Training; and
- A commitment to Bikeability.

The application must include the following information (can be as annexes to the application form):

- A business plan;
- Audited accounts (if available);
- Confirmation that the courses delivered will follow the approved National Standard Courses. If the applicant wishes to deliver different courses they must be submitted for assessment against the outcomes of the National Standard;
- Confirmation that all courses will be carried out by instructors holding the relevant NS numbers. (n.b. Instructor courses may only be carried out by recognised Instructor Trainers). ITOs are expected to have a minimum of two instructor trainers available to them;
- Details of their system for undertaking post-course assessments;

- Details of the systems to be used for seeking feedback from trainees and for dealing with issues raised;
- Details of the membership service offered to instructors, including the any membership application process that instructors would have to go through;
- Valid insurance documentation covering public liability. This should include evidence that qualified advice on insurance has been sought;
- Details of the process it will use to provide a public verification service of its instructors credentials;
- Details of the risk assessments that will be undertaken for courses;
- Health and safety policy;
- Equal opportunities policy;
- Data protection policy.

Candidates should note that any application which does not include this information will not be considered. The application form includes a checklist covering this information.

Details of the criteria on which this documentation will be assessed can be found in Annex B “Criteria for the Paper Based Assessment”.

**Stage 3 – Practical Delivery:** Applicants whose paper-based application demonstrates that they have, in the DfT and its agents (SDG) view, the potential to carry out instructor training to the required standard will be invited to run a pilot training course which will be observed and assessed

The assessment criteria for Stage 3 will be given to those applicants who are invited to run a pilot training course.

### **The Assessment Process**

The assessment of applications will be undertaken by SDG on behalf of the DfT. This section explains the assessment process that they will take the applications through.

There will be three elements to the assessment:

1. Initial assessment – a check of the application to identify any obvious gaps. After this SDG may contact applicants to seek clarifications. If clarifications are required the applicant will have a maximum of three weeks in which to respond.
2. Full paper assessment – this will consider whether the applicant has submitted all the required information and whether the information provided meets the ITO assessment criteria.
3. Applicants who after the first two elements of the assessment are judged as showing the potential to carry out instructor training will be invited to set up a pilot course which will be attended and assessed by SDG.

Following the completion of all three elements of the assessment SDG will advise the DfT which applicants they recommend as being suitable for ITO status. The DfT will make the final decision on which organisations they will recognise as ITOs. They aim to do this in the summer of 2010.

Applicants will be told whether they have been successful before a public announcement is made and will be given the opportunity to appeal if they believe that the assessment process has not been carried out correctly. Any re-assessment will be carried out on the basis of the documentation previously submitted – there will not be an opportunity to submit new information or undertake a new pilot course.

### **Key dates:**

- 26 February 2010 - deadline for EOIs
- 1 March 2010 - applications will be accepted from this date
- 8 March 2010 - briefing meeting for organisations that submitted an EOI
- 28 May 2010 - deadline for applications

### **Contact Details**

All EOIs and applications should be submitted to:

Instructor Training Organisation Applications  
Steer Davies Gleave  
f.a.o. Simon Hollowood  
28 – 32 Upper Ground  
London  
SE1 9PD

Email: [ITOapplications@sdgworld.net](mailto:ITOapplications@sdgworld.net)

For enquires please contact [simon.hollowood@sdgworld.net](mailto:simon.hollowood@sdgworld.net).

### **Confidentiality**

All applications will be treated as confidential and in general will only be viewed by relevant SDG and Department for Transport staff. However, applicants should note that there may be a very small number of circumstances where the Agent is required to release this documentation, for example to comply with legal requirements.

## Annex A

### **Roles and Responsibilities of Instructor Training Organisations**

#### **The courses**

ITOs will be expected to train instructor trainers, instructors and assistant instructors in accordance with the courses agreed during the assessment of their application. Copies of the published National Standard Instructor Trainer, Instructor and Assistant Instructor courses are available on request from SDG. It is recommended that all applicants check their own course materials for consistency with the published National Standard courses.

As a minimum, ITOs must offer National Standard Instructor courses. ITOs are not required to deliver Instructor Trainer and Assistant Instructor courses but those who choose to must agree their courses as part of the application. ITOs who initially do not deliver these courses may choose to do so at a later date but only after their courses have been agreed by the DfT.

Any ITO that wishes to amend their courses must agree the changes with the DfT prior to implementing them. If, as a result of such changes, the DfT no longer considers that the course meets the requirements of the National Standard for Cycle Training they reserve the right to withdraw their recognition of the organisation as an ITO.

There are no limits on the number of courses that an ITO may run, or the number of instructors that it must train. However, it is considered unlikely that an ITO delivering fewer than three courses a year will be able to maintain the standard required. In these circumstances, and following an audit, the DfT will consider whether it can continue to recognise the organisation as an ITO.

#### **The instructors**

ITOs will be responsible for ensuring that its instructor trainers are suitably qualified. Although it is for the ITO to determine how many instructor trainers they need we would expect there to be a minimum of two available at any one time.

#### **Registering new instructors**

ITOs will be required to provide SDG with details of all newly qualified instructors within 10 working days of qualification and make hard copies of certificates available on request. SDG will then issue NSI numbers on behalf of the DfT.

ITOs will be responsible for ensuring that only candidates who have achieved all the National Standard outcomes are put forward for registration as instructors. ITOs should be able to demonstrate that they have measures in place to prevent fraudulent claims of competence, achievement or accreditation.

## **Membership services**

All ITOs will be expected to provide a membership service. These services will vary but as a minimum should include providing opportunities for further development and providing updates on the National Standard for cycle training. These services will be recognised by the DfT.

ITOs may decide to provide other services such as networking opportunities, training outside of the National Standard (e.g. mountain bike training or bike maintenance) or insurance products. Such services will not be recognised by the DfT.

The process for membership of, or recognition by an ITO, including any fee payable, will be at the discretion of the ITO, but will be agreed with the DfT during the assessment process. ITOs will be responsible for satisfying themselves that any applicant for membership is qualified to deliver cycle training before accepting them.

## **Verification service**

ITOs will be required to offer the public a “verification service”. The details of this are for the ITO to decide but as a minimum it should include a statement of the credentials of any instructor either trained by the organisation or who is affiliated with the organisation.

## **Changes to agreed courses or services**

An ITO's courses, approach to post-course assessments and services will be agreed during the application process. Any changes to these should be agreed with the DfT prior to implementation. For example, an ITO who initially did not want to deliver Assistant Instructor courses but wished to start doing so would have to agree their Assistant Instructor course with the DfT.

## **Monitoring and quality control**

During the application process organisations are expected to demonstrate a commitment to achieving and maintaining a high standard of training. The DfT will gauge the quality of training through the application process and will continue to do so through regular monitoring and audit.

**Monitoring:** ITO's may be required to provide the following information on a half-yearly basis:

- Numbers and types of courses delivered;
- Numbers of qualified National Standard Instructors directly employed by the ITO;
- Number of trainees who passed and failed courses;
- Number of “members” split into those who were and were not trained by the ITO;
- Details of any bursaries or grant funding received from the DfT/Cycling England;

- Details of any complaints, appeals, grievances and disciplinary actions taken, incidents and accidents, and feedback received during the six-month period.

ITOs will be provided with a standardised monitoring form. Failure to provide the information may result in the DfT reconsidering whether it can continue to recognise the ITO.

**Audit:** all ITOs will be expected to go through an audit process. Audits are likely to take place up to 18 months after the ITO is recognised by the DfT and at regular intervals thereafter. Both the ITO's documentation and training courses will be audited. The DfT will work with any ITO that fails to demonstrate that it is maintaining the required standard to improve their delivery. However, there may be instances when the DfT either no longer recognises the ITO or decides that a repeat audit will need to be carried out.

Additionally the DfT may decide to carry out an audit if there are concerns around the quality of training provided by an ITO. These concerns may arise from the monitoring returns, complaints from members of the public or from other evidence.

## Annex B

### Criteria for the Paper Based Assessment

This Annex sets out criteria on which the paper based assessment will be undertaken. As part of this assessment all applicants are required to submit the documentary evidence set out in the guidance note. For assessment purposes this information is divided into the following themes:

- Table 1: Business management;
- Table 2: Membership services;
- Table 3: Instructor training delivery; and
- Table 4: Business policy.

The tables on the following pages explain why the documentary evidence is needed and also describes what the assessment team will be looking for in the documentary evidence.

In addition to the list assessors will be looking for evidence that the application demonstrates:

- A clear commitment to delivering high quality cycle training;
- That the applicants courses are compliant with the National Standard for Cycle Training; and
- A commitment to Bikeability.

Applicants should not see this as an exhaustive list. However, it gives a clear indication of the standards expected.



**Table 1 Business Management**

| Required Information            | Why it is required  | What the assessment team will be looking for   |
|---------------------------------|---|--|
| Business plan                   | To demonstrate that the applicant has a clear vision for the direction that its cycle training business will take. The business plan should also show that the applicant's resources match their plans. | Evidence that the organisation: <ul style="list-style-type: none"> <li>• Has a clear strategy for the future development and success of the business.</li> <li>• Is committed to the provision of instructor training beyond the short term.</li> <li>• Is able to provide the services to members that it has set out.</li> <li>• That the business plan relates specifically to the delivery of cycle instructor training</li> </ul> |
| Audited accounts (if available) | To demonstrate that the organisation is financially viable.   | Audited accounts for the organisation, for the most recent full year, specifically the net asset position on the balance sheet. <sup>2</sup>   |
| Valid Insurance Documentation   | To show the organisation has appropriate insurance cover for the services it provides.  | Confirmation that the organisation has valid insurance cover that is relevant and appropriate to the services provided, including a copy of the insurance certificate(s) <sup>3</sup> .  |

<sup>2</sup> The following types of organisations are exempt from being required to provide audited accounts, as part of this application:

- Local authorities - local authorities are not required to submit audited accounts.
- New organisations - new organisations are unlikely to have audited accounts available and so will not be able to submit them with their application. However, these organisations will be required to submit their audited accounts for assessment as soon as they do become available (i.e. within 12 months from the ITO application date).

<sup>3</sup> Please note that the Department for Transport is unable to advise on or verify insurance products or services and they will not form part of the ITO assessment process. We recommend that any organisation intending to provide insurance services should seek professional financial advice.

**Table 2 Membership Services**

| Required Information                                 | Why it is required  | What the assessment team will be looking for   |
|--|---|--|
| Membership Services                                  | To demonstrate that the applicant has a clear plan for the membership service that it will offer.   | <p>Information about:</p> <ul style="list-style-type: none"> <li>• What instructors etc need to do to become members , including any application forms that instructors will need to complete.</li> <li>• The criteria (including evidence of cycle training qualifications) that instructors need to meet before they can take membership.</li> <li>• The period of time over which the membership will be valid.</li> <li>• The services offered to members.. Including evidence that the minimum services as set out in the guidance will be provided.</li> <li>• Any membership fees.</li> </ul> |
| Public verification service                          | In order to receive Government cycle training grant., local authorities, school sports partnerships or other cycle training customers will, in future, be required to deliver training using NSIs who are members of an ITO. The ITO must have a system for storing NSI details and be able to verify that a given instructor is appropriately qualified. | <ul style="list-style-type: none"> <li>• Evidence that the organisation has in place a means for storing instructor details</li> <li>• Evidence of their approach to handling verification requests from customers (e.g. local authorities or school sports partnerships).</li> </ul>  |
| Continued Professional Development (CPD) for members | The reason ITOs are required to provide CPD services is to ensure that affiliated instructors have access to opportunities for career/role development and to ensure consistent and continuous provision of high quality cycle training.  | <ul style="list-style-type: none"> <li>• Evidence that the applicant will offer the minimum CPD as set out in the guidance note.. That is: <ul style="list-style-type: none"> <li>• Updating members on changes to the National Standard as and when these are available.</li> <li>• Provide members with opportunities for continued professional development.</li> </ul> </li> </ul>   |

**Table 3 Instructor Training Delivery**

| Required Information   | Why it is required   | What the assessment team will be looking for  |
|--|--|---|
| <p>Confirmation that courses delivered will follow the approved National Standard Courses.</p> <p>If the applicant wishes to deliver a different course or amend the approved course they must submit their course manual(s) and any supporting materials.</p> | <p>Copies of the course manual(s) and supporting materials are required in order to check that the course(s) is consistent with the National Standard.</p> | <p>Whether the organisation will be using the approved National Standard Course or whether they are using their own / adapted National Standard Course.</p> <ul style="list-style-type: none"> <li>• If the organisation is using the National Standard Course the assessors will be looking for evidence that they have properly integrated the manual(s) into their other processes and procedures.</li> </ul> <p>If the applicant is using their own or an adapted National Standard course the assessors will look for the following:</p> <ul style="list-style-type: none"> <li>• That the applicant has submitted all the courses they intend to deliver.</li> <li>• That the submitted courses deliver the approved National Standard outcomes specific to each course. The outcomes in each module must be clearly identified in the manual and any supporting materials.</li> <li>• That course outcomes are presented in the manual (and delivered in practice) in a systematic and progressive manner.</li> <li>• A clear understanding of the National Standard's outcome based approach and the key factors in the effective delivery of instructor training.</li> <li>• Clear and comprehensive guidance to instructor trainers on the content and delivery of the course(s).</li> <li>• Course structures must be realistic in their timings,</li> </ul> |

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|  |   | allowing enough time for meaningful practical assessment of trainees' capabilities and learning during the course.   |
| Confirmation that all courses will be carried out by suitably qualified and experienced instructor trainer | To ensure that the applicant will only be using suitably qualified instructor trainers.   | <ul style="list-style-type: none"> <li>Evidence that the applicant has at least two suitably qualified and experienced instructor trainers who are available to work for the organisation. Confirmation that they will be the people who will lead instructor training sessions.</li> </ul> <p>Applicants must do one of the following:</p> <ul style="list-style-type: none"> <li>Provide the National Standard Instructor Trainer (NSIT) numbers of all instructor trainers working for the organisation.</li> <li>Provide a statement, from the organisation, to say that the proposed instructor trainers have the ability to deliver the National Standard Instructor course to a high standard. The statement should include supporting evidence such as details of relevant experience of each proposed instructor trainer.</li> <li>If the a statement cannot be provided from the organisation, the applicant must on behalf of the organisation make a commitment that instructor trainers working for the organisation will attend an Instructor Trainer course as delivered by a currently accredited Instructor Training Provider and so be in possession of an NSIT number by the time the instructor trainer starts providing instructor training for the organisation. In addition, if proposed instructor trainers do not hold an NSIT number, the applicant should set out the number of years of relevant experience and type of experience of the proposed instructor trainers.</li> </ul> |
| Post course assessment (PCA)   | To ensure that the delivery of PCA is consistent in its quality and format for all candidates, and that PCA is available to those individuals that the ITO has trained. | <p>Evidence that:</p> <ul style="list-style-type: none"> <li>There is a clear approach to organising and delivering PCA that is delivered consistently and fairly. All provisionally accredited instructors</li> </ul>   |

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|  |  | <p>attending the ITO's courses or others seeking PCA must be made fully aware of this policy, either during their instructor training course or when making a first enquiry about PCA to the ITO.</p> <ul style="list-style-type: none"> <li>• As a minimum, PCA must comply with the published PCA form contained within Appendix 7. of the National Standard Instructor Trainer (NSIT) course.</li> <li>• Instructors receiving PCA must be provided with a copy of their completed PCA form within one week of the PCA taking place. The ITO must also retain a copy of the completed PCA form and retained for at least three years.</li> <li>• PCA is made available to all instructors trained by the ITO, as a minimum.</li> </ul> |
| <p>Details of the system for seeking feedback from course participants</p> | <p>To ensure that there is a structured approach to continuous improvement and development in the course and its delivery.</p>   | <p>That clear systems are in place for:</p> <ul style="list-style-type: none"> <li>• Seeking feedback from all trainees in a timely manner (at least within 5 days of course completion).</li> <li>• Having an appropriate person in place to review feedback periodically (at least annually).</li> <li>• Dealing with issues raised.</li> <li>• Keeping records of the above.</li> </ul>  |
| <p>Approach to the applicant's risk assessment policy</p>                  | <p>To ensure the adequate risk assessment will be undertaken for all training and that risk trainees will be taught how to apply risk assessment in a practical setting.</p> | <p>That processes are in place for:</p> <ul style="list-style-type: none"> <li>• Ensuring that risk assessments are completed for all courses.</li> <li>• Ensuring that risk assessments are reviewed periodically (at least annually).</li> </ul> <p>That there is a clear approach to teaching risk assessment to candidates. This should be:</p> <ul style="list-style-type: none"> <li>• Covered in classroom sessions.</li> <li>• Covered during practical sessions.</li> </ul> <p>Organisations should ensure there is a clear link between theoretical tuition on risk assessment and</p>  |

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|  |  | practical instruction on undertaking risk assessments during the practical sessions of the course. |
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**Table 4 Business Policies<sup>4</sup>**

| Required information       | Why it is required  | What the assessment team will be looking for  |
|----------------------------|---|---|
| Health and safety policy   | To demonstrate there is a structured approach to health and safety that is relevant to the services provided by the organisation. | Health and safety policy and guidance relevant to the services provided.  |
| Equal opportunities policy | To ensure there is a policy in place covering recruitment and selection of staff and candidate access to training courses.        | A policy is in place covering recruitment and selection of staff, candidate access to training courses, and treatment of candidates whilst on courses.  |
| Data protection policy     | To ensure that there is a clear approach to holding data on individuals and to prevent theft or improper use.                     | Procedures to notify individuals on the data held on them, and there are procedures to prevent theft or improper use of data.   |
| Complaints policy          | To ensure that there is a clear approach to dealing with complaints.  | Evidence that a clear process is in place that: <ul style="list-style-type: none"> <li>• Outlines how official complaints should be made and will be dealt with. Policies should not refer complainants to the DfT.</li> <li>• Describes how the process would be made known to candidates.</li> <li>• Sets out the maximum timescales attached to each step of the process.</li> </ul> |

<sup>4</sup> Copies of business policy documents are requested to ensure that such policies are in place. The DfT takes no responsibility for the content of those policies.