

STEP: The Informed Trustee

Enrolment Policy

1 General

- 1.1 The Informed Trustee course is an open entry course to anyone interested in charity trusteeship. To enrol onto the course you do not have to be appointed into a charity trustee role.

The course has been designed to assist those considering applying to be a charity trustee at a future date, those newly appointed to a trustee role and as refresher training to those already established.

The course is delivered online and on demand and provides full coverage of the charity regulation across the UK. It is assessed by way of an online, multiple choice assessment relevant to the jurisdiction you are based in.

2 Registration

- 2.1 You are considered enrolled on the course when you have paid the course fee.
2.2 You should be aged 18 or over to enrol on the course.
2.3 You do not have to be a member of STEP to register for The Informed Trustee
2.4 Enrolling or successfully completing the course does not confer your suitability to be appointed as a Charity Trustee as per the regulatory requirements in England, Scotland, Wales and Northern Ireland. If you are in doubt of your suitability you should consult the guidance of the relevant charity regulator for your jurisdiction. These are:

- **England and Wales:** The Charity Commission
- **Scotland:** Office of the Scottish Charity Regulator
- **Northern Ireland:** The Charity Commission for Northern Ireland

3 Payment of course fees

- 3.1 The cost of The Informed Trustee as of 2018 is £249. This includes:
 - A one year licence to the course learning material
 - One attempt at the course assessment
 - A further resit should the first attempt be unsuccessful.
- 3.2 If you have failed to pass the course assessment and the resit, and your one year licence **has not expired**, you may purchase one additional resit at a cost of £30.
- 3.3 If you have failed to pass the course assessment and your resit, and your one year licence **has expired**, the full cost of the course (£249) is payable again. This will give you the same entitlement as included in the licence at 3.1 and the additional resit at a cost of £30 provided for at 3.2.
- 3.4 Payment of course fee is payable by credit or debit card. Payments for Group Bookings can only be made via invoice.
- 3.5 STEP reserves the right to review the course fee and pricing structure on an annual basis.
- 3.6 Receipts for payments can be obtained by emailing ctt@step.org.

Employer / Organisational funding

- 4 Employers or organisations wishing to fund their staff or volunteers on The Informed Trustee may be able to take advantage of group discounting arrangements. Please contact ctt@step.org for details.

5 Refunds

- 5.1 Under UK Law, students (or those funding them) you have the right to cancel or request a refund under certain circumstances, in accordance and compliance with your rights as a consumer.
- 5.2 A full refund may only be issued if the student (or the organisation funding the student) requests to cancel enrolment on the course and terminates this contract less than 14 days after the date of enrolment on the course, this contract shall be deemed to be terminated with immediate effect. STEP shall provide a full refund of any fees paid by the student or funding organisation on the student's behalf save that STEP shall be entitled to make a deduction of £50 to cover administration costs.
- 5.3 If the student or the organisation sponsoring on their behalf requests to cancel from the programme and terminate this contract more than two weeks after the registration date, no refunds will be paid in any circumstances.
- 5.4 To request a refund contact us at ctt@step.org.

6 Enrolment

- 6.1 In order to access the learning content of The Informed Trustee, you must enrol via The Informed Trustee course platform. If you are already a STEP member, you can do this via logging into the STEP website with your STEP login credentials.
- 6.2 If you are enrolling on the course you will need to provide certain personal data: including but not limited to your full name, an email address, postal address and date of birth.
- 6.3 We will not sell, distribute or lease your personal information to third parties unless we have your permission or are required by law to do so.
- 6.4 You are legally entitled to request details of the personal information which we hold about you, under the UK's Data Protection Act 1998.
- 6.5 You can find information about how we use your personal information in our [Privacy Notice](#) available on the STEP website.
- 6.6 Access information or login credentials should not be divulged or access to the learning material shared with any third party for any reason.
- 6.7 By enrolling on the course, you undertake to us that all information provided in relation to your enrolment on the course is and will continue to be accurate, current and complete at all times and that you will maintain and update your information to keep it accurate, current and complete.
- 6.8 If any information provided by you in relation to your enrolment is untrue, inaccurate, not current or incomplete, we reserve the right to suspend or terminate your access to the learning content of The Informed Trustee.

7 Contract term

- 7.1 A contract shall come into force from the date of registration on a course and shall remain in force until the expiry of the student's licence to access the material or examination has expired (whichever is sooner.)

8 External Endorsement , Conferment of Award and Learning Hours

- 8.1 STEP recommend students spend a minimum of 50 learning hours on The Informed Trustee course and preparing for the course assessment.
- 8.2 Upon successfully passing the course assessment, you will be able to download a certificate showing you have completed the course and passed the assessment.
- 8.3 The Informed Trustee course is not certificated as conferring credit against STEP's Qualifications and Membership Framework. Those completing the course successfully may not use this to confer credit against STEP membership.
- 8.4 Where STEP has received external accreditation or endorsement of The Informed Trustee course this does not confer an award or credit on the part of the appraising institution or organisation.

9 Student Conduct

- 9.1 By enrolling with STEP on The Informed Trustee, you agree that you:
- Are, and will continue to be, registered for the STEP website and course platform only once and will not set up multiple accounts;
 - Will not let anyone else use your licence to the learning material;
 - Will not cheat during the exam relating to The Informed Trustee, nor share solutions to any questions contained within the exam.
 - Will notify the administrators for Charity Trustee Training (ctt@step.org) or the STEP Professional Development Team (pd@step.org) immediately if you become aware of any other student cheating or breaching these terms.
- 9.2 If you are disqualified for any reason under paragraph 9.1 we may prohibit your access or participation in this course or any other future courses we may run.