

Level 3 NVQ in Advice and Guidance (3069)

Optional Units



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Level 3 NVQ in Advice and Guidance (3069)

Optional units



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Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG3

Unit Title: Develop interactions with advice and guidance clients

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony:** Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. policy leaflets.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. case notes, observation/assessment records.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Factors that need to be considered when interacting with clients.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. Influence of ethical requirements on the ways you respond to clients.

Unit AG 3

Develop interactions with advice and guidance clients

Element 3.1

Enable clients to explore their issues

You must be able to (performance criteria)	You must know (knowledge specification)
1 Create an environment in which clients feel comfortable enough to express their issues and concerns	a what types of environment are appropriate to different clients and activities b what situations could make clients feel uncomfortable
2 Explain clearly the organisation's policy on record keeping and confidentiality	c what the organisation's policies are that are relevant to clients d how to summarise the organisation's policies
3 Agree the purpose and the boundaries of the interaction with the client	e what purposes the interaction might serve f how to negotiate the boundaries of an interaction
4 Encourage clients to explore their requirements and their ideas for achieving them	g what types of opportunities for exploring issues could be provided h what the different requirements are that clients might have i how different requirements should be explored
5 Encourage clients to explore any potential barriers to achieving requirements and methods of overcoming them	j what barriers might prevent clients from achieving their requirements k how clients can overcome different barriers to achievement
6 Explore the issues raised by clients to establish their nature and scope	l how to establish the nature and scope of different issues m how to help clients become aware of their underlying issues
7 Encourage clients to establish priorities for achieving their requirements	n how to help clients establish priorities o why it is important that clients establish priorities
8 Identify any situations where immediate action is required to assist clients and take the appropriate action	p what types of situations might occur that require immediate action q what actions should be taken to deal with different situations
9 Comply with all relevant legislation, codes	r the name of any legislative provision, or

of practice, guidelines, and ethical requirements

professional or organisational guidelines which underpin the performance of the activities included in this Unit and describe how you comply with these

- s why it is important to comply with different requirements
- t what the consequences are of not complying with different requirements
- u how to obtain information on the requirements

Unit AG 3

Develop interactions with advice and guidance clients

Element 3.2

Sustain interactions with clients

You must be able to (performance criteria)	You must know (knowledge specification)
1 Recognise the nature and stage of the interaction with the client	a what types of interactions occur b how to detect which type of interaction is occurring c what the stages of interaction with different clients are
2 Provide suitable opportunities for clients to sustain the interaction if appropriate	d what opportunities should be made available for sustaining interactions e how to keep clients involved in the interaction f when it is inappropriate to continue the interaction
3 Encourage clients to provide additional information on their situation or requirements	g what types of information should be obtained from clients h how to encourage clients to give you information
4 Manage any inappropriate information given by the client	i what might constitute inappropriate information and how to manage it
5 Respond to clients' immediate issues at each stage during the interaction	j why it is important to respond at regular intervals
6 Affirm clients' autonomy in decision making	k why it is important to provide clients with opportunities to speak without interruption l why it is important to affirm the autonomy of clients
7 Provide suitable indications to reassure clients of continued interest	m what types of indications of reassurance are appropriate
8 Provide responses according to the guidelines and procedures of the organisation	n what the guidelines and procedures of the organisation are
9 Identify any signs of increased stress during interactions and establish their significance	o what the signs of increased stress in clients are p the significance of any signs of stress

10 Identify any problems with maintaining interactions and take appropriate action to address them

q what the types of problem are that could occur

r what actions can be taken to address them

s why it is important to address problems

t what the implications are of not addressing the problems

Unit AG 3

Develop interactions with advice and guidance clients

Element 3.3

Bring interactions to an end

You must be able to (performance criteria)	You must know (knowledge specification)
1 Provide clear opportunities for clients to signal their desire to end the interaction	a how clients might signal their desire to end the interaction
2 Manage effectively any tensions between the time and resources that are available and clients' requirements	b how much time and resources are available for interactions c what types of tensions could emerge with clients
3 Allow clients to decide what their next steps will be	d why it is important to allow clients to decide their next steps
4 Encourage and acknowledge clients' reactions and feelings about the ending of the interaction	e what the different reactions and feelings are that can occur in clients
5 Summarise the interaction and the outcomes achieved	f how to summarise interactions
6 Identify and clarify opportunities for providing further support for clients	g what further support might be available
7 Agree with clients any further activities that are necessary to clarify their requirements	h what other activities might be necessary
8 Identify and agree requirements that cannot be met and facilitate access to additional or alternative sources of support	i what other sources of support could help the clients
9 Record interactions in the appropriate systems	j what the systems are for recording interactions k why it is important to use the systems l what the procedures are that relate to the use of the systems

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG 4

Unit Title: Interact with clients using a range of media

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. leaflets, posters, computer-based media.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. case notes, correspondence.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Problem situations that could arise and the importance of taking suitable action.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. Recognising stress during interactions, establishing its significance and responding appropriately.

Unit AG 4

Element 4.1

Interact with clients using a range of media

Establish interactions with clients using a range of media

You must be able to (performance criteria)

- 1 Respond to clients promptly according to organisational policies
- 2 Respond to clients in a way that encourages them to remain connected to the service
- 3 Identify any constraints on clients and the circumstances in which the interaction is being made
- 4 Provide information about the service and confirm its appropriateness to the clients
- 5 Encourage clients to share their concerns and to focus on their requirements
- 6 Assess whether there are any risks or dangers facing the clients, and take appropriate action to deal with them
- 7 Identify any problems with maintaining the interaction and take appropriate action to address them
- 8 Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements

You must know (knowledge specification)

- a what the procedures are for welcoming clients
- b how to welcome different clients
- c how to use different types of communication media
- d how to encourage clients to stay connected
- e what type of constraints clients might face
- f what the potential circumstances of the clients are
- g what information about the service should be provided
- h who can be assisted by the service
- i how to encourage clients without face to face interaction
- j what type of risks or dangers different clients might face
- k what action should be taken to deal with different risks or dangers
- l what the types of problem are that could occur
- m what actions can be taken to address them
- n why it is important to address problems
- o what the implications are of not addressing the problems
- p what the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- q why it is important to comply with different requirements
- r what the consequences are of not complying with different requirements
- s how to obtain information on the requirements

Unit AG 4
Element 4.2

Interact with clients using a range of media
Sustain interactions with clients using a range of media

You must be able to (performance criteria)

-
- 1 Recognise the nature of the interaction with clients

 - 2 Provide suitable opportunities for clients to sustain the interaction

 - 3 Encourage clients to provide additional information on their situation or requirements

 - 4 Respond to clients' immediate requirements at each stage during the interaction

 - 5 Provide suitable indications to reassure clients of continued interest

 - 6 Provide responses according to the guidelines and procedures of the organisation

 - 7 Identify any signs of increased stress during interactions and establish their significance

 - 8 Identify any problems with maintaining interactions and take appropriate action to address them

You must know (knowledge specification)

-
- a what type of interactions occur
 - b how to detect which type of interaction is occurring

 - c what opportunities should be made available
 - d how to encourage the client to maintain the interaction

 - e what types of information should be obtained

 - f why it is important to respond at regular intervals
 - g why it is important to provide clients with opportunities to speak without interruption
 - h how to use the anonymity of clients to assist them to speak

 - i what types of indications are appropriate to different media

 - j what the guidelines and procedures of the organisation are

 - k what signs might indicate that clients are under increased stress
 - l the possible significance of any signs of stress

 - m what types of problem could occur
 - n what actions can be taken to address them
 - o why it is important to address problems
 - p what the implications are of not addressing the problems

Unit AG 4
Element 4.3

Interact with clients using a range of media
Conclude interactions with clients using a range of media

You must be able to (performance criteria)

-
- 1 Provide clear information on the requirement to end the interaction

 - 2 Agree with clients further actions that could be taken

 - 3 End interactions according to the guidelines and procedures of the organisation

 - 4 Identify situations where it would be dangerous or disadvantageous to the interest of clients to terminate the interaction

 - 5 Take the appropriate action to resolve dangerous situations

 - 6 Ensure the anonymity of clients, self, and colleagues is maintained according to the procedures of the service

 - 7 Record details of interactions in the appropriate systems

You must know (knowledge specification)

-
- a when interactions should be ended
 - b what the reasons are for ending an interaction

 - c what further actions could be taken

 - d what the guidelines and procedures of the organisation are

 - e what situations are dangerous
 - f who could be in danger

 - g what actions should be taken to resolve dangerous situations

 - h why it is important to maintain anonymity
 - i what the procedures of the organisation are in relation to anonymity

 - j what the systems are for recording interactions
 - k why it is important to use the systems
 - l what the procedures are relating to the use of the systems

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG5

Unit Title: Assist advice and guidance clients to decide on a course of action

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. leaflets.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. case notes, session notes, action plan.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Consequences, advantages, and disadvantages of the options for clients when selecting a course of action to meet their requirements.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/reflective account to provide some of the performance evidence for this unit e.g. Supporting clients in the decision making process.

Unit AG 5

Assist advice and guidance clients to decide on a course of action

Element 5.1

Assist clients to clarify their requirements

You must be able to (performance criteria)

- 1 Use the appropriate language and pace of communications for each client
- 2 Explain clearly the organisation's policy on record keeping and confidentiality
- 3 Encourage clients to identify and explore their requirements and their ideas for achieving them
- 4 Agree the purpose and the boundaries of the interaction with the client
- 5 Offer examples of alternative means for clients to achieve their requirements
- 6 Clarify and confirm clients' requirements with them
- 7 Identify any situation where immediate action is required to assist clients and take immediate action
- 8 Identify and agree requirements that cannot be met and facilitate access to additional or alternative sources of support
- 9 Encourage clients to establish priorities for achieving their requirements
- 10 Review the interaction with the client on a regular basis to ensure it is still appropriate for them
- 11 Comply with all relevant legislation, codes of practice, guidelines, and ethical

You must know (knowledge specification)

- a what constitutes appropriate language and pace of communications
- b what are the organisation's policies that are relevant to clients
- c how to summarise the organisation's policies
- d what are the relevant models of good practice for assisting clients to clarify their requirements
- e what type of requirements are explored
- f what purposes might the interaction serve
- g how to negotiate the boundaries of an interaction
- h what ideas do clients suggest for achieving their requirements
- l what alternative means are available for clients to achieve their requirements
- j how to clarify requirements with clients
- k why it is important to clarify requirements with clients
- i why it is important to confirm requirements with clients
- m what type of situations occur that require immediate action
- n what actions should be taken to deal with different situations
- o what other sources of support could help the clients
- p how to help clients establish priorities
- q how to review interaction with clients
- r name any legislative provision, professional or organisational guidelines which underpin the

requirements

performance of the activities included in this unit and describe how you comply with these

- s why it is important to comply with different requirements
- t what are the consequences of not complying with different requirements
- u how to obtain information on the requirements

Unit AG 5

Assist advice and guidance clients to decide on a course of action

Element 5.2

Explore a range of options with clients for achieving their requirements

You must be able to (performance criteria)

- 1 Encourage clients to explore their decision making process
- 2 Review clients' priorities to identify their current requirements

- 3 Identify any unrealistic requirements and identify possible modifications to them

- 4 Identify a suitable range of options for achieving clients' requirements

- 5 Provide clear information on the options and their key features
- 6 Assist clients to interpret the information provided

- 7 Explore the potential consequences, advantages, and disadvantages of the options to clients
- 8 Consider alternative means for clients to achieve their requirements

- 9 Explore clients' views about options to achieve their requirements

You must know (knowledge specification)

- a what barriers could affect the clients decision making
- b how to support the client in their decision making process
- c how to review clients' priorities

- d how to determine realistic requirements
- e how can requirements be modified to make them more realistic

- f what is the range of options that is available
- g how different options might be suitable for different clients

- h what type of information should be provided for different clients
- i what are the key features of the options
- j what type of assistance might be required for clients to interpret the information provided

- k what are the consequences, advantages, and disadvantages of different options
- l how to present options to clients
- m what alternative means could help clients achieve their requirements

- n how are different clients likely to receive the options
- o how to explore the options with different clients

Unit AG 5

Assist advice and guidance clients to decide on a course of action

Element 5.3

Enable clients to select a course of action

You must be able to (performance criteria)

- 1 Explore clients' views about options to achieve their requirements
- 2 Assist clients to interpret all the relevant information provided
- 3 Encourage clients to evaluate the implications of any decision
- 4 Affirm clients' autonomy in decision making
- 5 Assist clients to reach a decision on the most appropriate course of action for their requirements and personal circumstances
- 6 Encourage clients to review their decision-making process and their reasons for selecting the course of action
- 7 Identify any problems with the chosen course of action and encourage the client to take appropriate action to address them
- 8 Agree with clients any further activities that are necessary to meet their requirements
- 9 Encourage clients to identify any further requirements for support
- 10 Summarise the course of action and agree next steps with the client
- 11 Record summaries of the interaction in the appropriate systems

You must know (knowledge specification)

- a how are different clients likely to receive the options
- b how to explore the options with different clients
- c what information might be provided for clients
- d what type of assistance might be required for clients to interpret the information provided
- e what are the potential implications of different decisions
- f how to encourage clients to evaluate information
- g why is it important to confirm the autonomy of clients
- h how to assist clients to reach decisions
- i how to match the options to clients' particular circumstances
- j what are the decision-making processes that clients use
- k what are the types of problem that could occur
- l what actions can be taken to address them
- m why it is important to address problems
- n what are the implications of not addressing the problems
- o what other activities might be necessary
- p what other types of requirement might emerge
- q how to summarise the course of action in the appropriate format for the client
- r what are the systems for recording summaries
- s why it is important to use the systems
- t what are the procedures relating to the use of the systems

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG6

Unit Title: Prepare clients through advice and guidance for the implementation of a course of action

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. leaflets, diary records, guidelines.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. case notes, action plan.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will

need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Implementation of the action plan and the importance of a rationale for any changes.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. different stages and considerations in preparing and developing action plans with clients.

Unit AG 6

Prepare clients through advice and guidance for the implementation of a course of action

Element 6.1

Assist clients to prepare an action plan

You must be able to (performance criteria)

- 1 Confirm the course of action that has been chosen
- 2 Explain clearly to clients the roles and responsibilities of those involved in the chosen course of action
- 3 Explore the potential advantages and disadvantages of the chosen course of action with clients
- 4 Describe clearly the potential stages, time scales, and any cost implications of the chosen course of action
- 5 Outline the expected outcomes of each stage of the chosen course of action
- 6 Inform clients of the types of information that may be used during the chosen course of action
- 7 Identify any unrealistic expectations and explore any possible modifications to them
- 8 Provide clients with any additional relevant information they might require
- 9 Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements

You must know (knowledge specification)

- a how to confirm the decisions of clients
- b why it is important to confirm the course of action
- c what is involved in the different types of activity
- d what are the difficulties and responsibilities of different services and people
- e what are the potential advantages and disadvantages of different activities
- f what are the difficulties in achieving the requirements of clients
- g what are the stages and time scales of different types of activity
- h what are the cost implications to all relevant parties
- i how each stage contributes to the overall activity
- j what types of information may be used during different courses of action
- k what types of unrealistic expectations might be proposed
- l how these can be modified to make them more realistic
- m what type of additional information is required by different clients
- n what are the relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- o why it is important to comply with different requirements
- p what are the consequences of not complying with different requirements
- q how to obtain information on the requirements

Unit AG 6

Prepare clients through advice and guidance for the implementation of a course of action

Element 6.2

Assist clients to develop the action plan

You must be able to (performance criteria)

- 1 Incorporate all relevant information about the chosen course of action into the action plan
- 2 Ensure the action plan clearly specifies the methods, time scale, and responsibilities for delivering clients' requirements
- 3 Ensure the action plan is capable of being implemented
- 4 Produce the action plan in the agreed format with the necessary supporting documentation
- 5 Review the content of the action plan with clients
- 6 Agree the process for reviewing the implementation of the action plan and identify any further activities that are necessary to meet clients' requirements
- 7 Record the action plan in the appropriate systems

You must know (knowledge specification)

- a what information should be incorporated
- b what are the methods, time scales, and responsibilities for delivering different requirements
- c how to incorporate different methods, time scales, and responsibilities
- d how to check the feasibility of the action plan
- e what factors might affect the feasibility of the action plan
- f what are the different formats for action plans
- g what type of supporting documentation might be required
- h why it is important to review the action plan with clients
- i how often should the implementation process be reviewed
- j what type of review should take place
- k what are the systems for recording action plans
- l why it is important to use the systems
- m what are the procedures relating to the use of the systems

Unit AG 6

Prepare clients through advice and guidance for the implementation of a course of action

Element 6.3

Assist clients to identify how the action plan might be implemented

You must be able to (performance criteria)

- 1 Identify and prioritise the key objectives and stages of the action plan
- 2 Explore any potential difficulties in achieving the action plan
- 3 Identify any difficulties in achieving the action plan
- 4 Identify potential methods for implementing the course of action
- 5 Assist clients to select methods that are most likely to be effective
- 6 Agree with clients the methods to be adopted
- 7 Provide a reasoned rationale for any significant changes to the action plan
- 8 Identify any requirements that cannot be met and establish alternative actions for dealing with them
- 9 Confirm the understanding of clients and agree for the implementation of the action plan to commence

You must know (knowledge specification)

- a how to confirm the decisions of clients
- b why it is important to confirm the course of action
- c what are the potential difficulties of different courses of action
- d how to overcome potential difficulties
- e what are the potential difficulties of different courses of action
- f how to overcome potential difficulties
- g what are the methods for implementing different courses of action
- h what methods have proved effective
- i why it is important to agree the methods
- j what types of change to the action plan might be required
- k why it is important to provide a rationale for any changes to the action plan
- l what other actions could be taken
- m how to confirm the understanding of clients
- n why it is important to reach agreement for the implementation to commence

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG7

Unit Title: Assist clients through advice and guidance to review their achievement of a course of action

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. review procedures.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. case notes, action plan, review records.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will

need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. reviewing and measuring the effectiveness of the different methods used in implementing the action plan.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. Effect of the Valuing People White Paper in terms of review and progress and giving feedback to clients. Similarly for any succeeding White Paper/legislation.

Unit AG 7

Assist clients through advice and guidance to review their achievement of a course of action

Element 7.1

Review progress and achievements with clients

You must be able to (performance criteria)

1 Provide suitable opportunities for clients to review the progress and achievements of the course of action

2 Confirm the course of action that was taken

3 Review the key objectives and stages of the course of action

4 Identify and agree with clients the objectives that have been achieved and those that have not

5 Review the suitability of the methods used by clients to implement the course of action

6 Identify the methods that were most effective

7 Identify any issues faced during the implementation of the course of action

8 Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements

You must know (knowledge specification)

a what the relevant models of good practice are for assisting clients to review their achievements

b how often progress and achievements should be reviewed

c what types of progress review should take place

d how to establish the courses of action that were undertaken

e how to review key objectives and stages

f why it is important to identify achievements

g how to identify the achievements

h what the indications are that objectives have not been achieved

i which methods are used for implementing different courses of action

j why different methods might be suitable for different clients

k what types of problems can be encountered by different clients using different methods

l how to assess the effectiveness of different methods

m which methods can be effective for different clients

n what types of issue could occur

o what actions can be taken to address them

p what the implications are of not addressing the issues

q what the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection

r why it is important to comply with different requirements

s what the consequences are of not complying with different requirements

t how to obtain information on the requirements

9 Provide suitable opportunities for clients to obtain feedback on progress

- u what the procedures are for checking progress
- v how often progress should be reviewed
- w what types of feedback should be provided

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG11

Unit Title: Negotiate on behalf of advice and guidance clients

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. case notes, agreements, negotiation records.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. obtaining information on client requirements and selecting the appropriate negotiating strategy.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/reflective account to provide some of the performance evidence for this unit e.g. Importance of complying with different requirements when formulating an agreement.

Unit AG 11 Negotiate on behalf of advice and guidance clients

Element 11.1 Exchange offers for clients

You must be able (performance criteria)

- 1 Review the requirements of clients
- 2 Identify a suitable negotiation strategy to achieve the requirements of clients
- 3 Prepare suitable offers for clients that encompass their requirements
- 4 Receive offers from other parties
- 5 Assess how far the offers achieve the requirements of clients
- 6 Consult with clients on the offers that have been received
- 7 Recommend the next stages in the negotiations
- 8 Record details of the negotiations in the appropriate systems

You must know (knowledge specification)

- a how to obtain information on clients' requirements
- b what type of negotiation strategies are suitable for different types of issue
- c how to prepare offers over a period of time
- d when to present new offers
- e how to receive offers
- f how to assess offers and what different offers might signify
- g when to consult clients
- h the potential next stages in negotiations
- i when to conclude negotiations
- j what the systems are for recording negotiations and the procedures that relate to the use of these
- k why it is important to use the systems

Unit AG 11 Negotiate on behalf of advice and guidance clients

Element 11.2 Establish an agreement for clients

You must be able to (performance criteria)

- 1 Produce agreements that effectively meet the requirements of clients
- 2 Incorporate all necessary details into the agreement
- 3 Ensure the agreement is capable of being implemented
- 4 Ensure the agreement complies with all relevant legislation, codes of practice, guidelines, and ethical requirements
- 5 Confirm agreements with clients at appropriate points in the negotiation process
- 6 Provide a suitable rationale for any requirements that cannot be met or any significant changes to the agreement
- 7 Produce the agreement in the required formats with the necessary supporting documentation
- 8 Record agreements in the appropriate systems

You must know (knowledge specification)

- a what different types of agreement can be reached
- b what types of detail should be included in the agreements
- c how to check the feasibility of the agreement
- d what factors might affect the agreement
- e the relevant national, local, professional, and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- f why it is important to comply with different requirements
- g what the consequences are of not complying with different requirements
- h how to obtain information on the requirements
- i when clients should be consulted during negotiations
- j what levels of detail clients require
- k what types of change to the agreement might be required
- l why it is important to provide a rationale for any changes to agreements
- m what the different formats are for agreements
- n what types of supporting documentation might be required
- o what the systems are for recording agreements and the procedures for using these
- p why it is important to use the systems

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG12

Unit Title: Liaise with other services

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients/service users may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. correspondence, procedure documents, and directory of services.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. establishing and complying with procedures in the exchange of information.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. Importance of protecting the information sources procedurally and ways of deciding whether information is valid.

Unit AG 12

Liase with other services

Element 12.1

Establish procedures for exchanging information with other services

You must be able to (performance criteria)

- 1 Identify and comply with procedures for exchanging information between services
- 2 Consult with other services on the information requirements of each service
- 3 Agree the purpose, scope, and procedures for exchanging information
- 4 Identify clearly the roles and responsibilities for exchanging information
- 5 Identify the priorities of different services for exchanging information
- 6 Disseminate the procedures for exchanging information with other services
- 7 Review regularly the procedures for exchanging information
- 8 Ensure the exchange of information complies with all relevant legislation, codes of practice, guidelines, and ethical requirements

You must know (knowledge specification)

- a which services might require information
- b which criteria can be used
- c the culture and ethos of the other services
- d what the procedures are for the exchange of information
- e why it is important to understand the objectives of other services
- f what types of information are required
- g what information is required by different services
- h why it is important to reach agreement on the type of information exchanged
- i who is involved in different types of information provision
- j what the priorities of other services are
- k how to disseminate different types of procedure
- l who should be informed of the procedures
- m which procedures should be reviewed
- n when procedures are generally reviewed
- o the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- p why it is important to comply with different requirements
- q what the consequences are of not complying with different requirements
- r how to obtain information on the requirements

Unit AG 12

Liaise with other services

Element 12.2

Provide information to other services

You must be able to (performance criteria)

- 1 Confirm the information required by other services

- 2 Comply with the services' procedures for exchanging information

- 3 Identify the information that seems most appropriate

- 4 Assist other services to access and interpret the information they receive

- 5 Confirm with the other services that the information that is provided is sufficient and appropriate to their requirements

- 6 Provide other services with additional information on other sources of relevant information

- 7 Record the results of the information provision in the appropriate systems

You must know (knowledge specification)

- a what information the other services specifically require

- b when other services require information by

- c what the services' procedures are
- d why it is important to comply with them
- e what the consequences are of not complying with them

- f how to match the information to the requirements of other services

- g where different information is held
- h which factors affect the interpretation of the material

- i why it is important to check that the other services have received the information they require

- j what the other sources of information are
- k how other services can access the information

- l what the systems for recording the provision of information are and the procedures for using them
- m why it is important to use the systems

Unit AG 12

Liaise with other services

Element 12.3

Obtain information from other services

You must be able to (performance criteria)

- 1 Confirm the information required from other services
- 2 Comply with the services' procedures for exchanging information
- 3 Determine the methods that should be used for obtaining the information
- 4 Access the relevant information sources using the appropriate procedures
- 5 Obtain the information using the specified methods
- 6 Confirm the validity of the information
- 7 Protect the information sources according to agreed procedures
- 8 Identify any problems with obtaining the information
- 9 Record the information accurately in the appropriate systems

You must know (knowledge specification)

- a what types of information are required from the other services
- b when the other services require information by
- c what the services' procedures are for exchanging information
- d why it is important to comply with the procedures
- e what the consequences are of not complying with the procedures
- f the different methods that can be used for obtaining information
- g which methods are appropriate for obtaining different types of information
- h what the procedures for accessing information are
- i what difficulties can occur when obtaining information
- j why it is important to use the agreed methods for obtaining information
- k how to decide whether the information is valid
- l why it is important to protect the information sources
- m the types of problem that could occur
- n what actions can be taken to address them
- o why it is important to address problems
- p what the implications are of not addressing the problems
- q what are the systems for recording information are and the procedures for using these
- r why it is important to use the systems

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG13

Unit Title: Enable advice and guidance clients to access referral opportunities

Evidence Requirements for this unit:

You must provide your assessor with evidence for ALL the performance criteria and ALL the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. directory of other services.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. case notes, records, referral documents.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Presentation of referral options to clients.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. evaluating the suitability of other services and confirming their capability to meet the clients' requirements.

Unit AG 13 Enable advice and guidance clients to access referral opportunities

Element 13.1 Identify options for referral

You must be able to (performance criteria)

-
- 1 Obtain information from clients on their requirements
 - 2 Obtain clear, relevant, and current information on other services that are potentially suitable
-
- 3 Assess the suitability of other services for meeting clients' requirements
 - 4 Obtain further clarification from clients when the services appear inappropriate
-
- 5 Confirm the acceptance criteria and procedures of the other services
-
- 6 Review the requirements of clients and check them against the acceptance criteria of the other services
-
- 7 Ensure the other services have the capacity and resources to deal with additional clients
-
- 8 Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements

You must know (knowledge specification)

-
- a what other services are available
 - b how to obtain information on other services
 - c what information should be obtained
 - d what types of information are particularly useful
-
- e what requirements might be met by other services
 - f how to evaluate the suitability of other services
 - g what types of additional information should be obtained
 - h what other alternatives are available
-
- i how to obtain information on acceptance criteria
 - j what the procedures of different services are
-
- K how to match clients' requirements against acceptance criteria
-
- l how to check the services' capacity and resources
-
- m the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
 - n why it is important to comply with different requirements
 - o what the consequences are of not complying with different requirements
 - p how to obtain information on the requirements

Unit AG 13 Enable advice and guidance clients to access referral opportunities

Element 13.2 Enable clients to take up referral opportunities

You must be able to (performance criteria)

- 1 Review the referral options with clients
- 2 Identify the advantages and disadvantages of the referral options for the clients
- 3 Provide sufficient information, in an appropriate format, to enable clients to make informed decisions about the referral
- 4 Establish the acceptability of the referral with clients
- 5 Provide additional information and support when required by clients
- 6 Plan the effective implementation of the referral with the client and facilitate contact with the relevant services
- 7 Review the boundaries of confidentiality with clients and inform them of the information that has to be passed between the relevant services
- 8 Ensure all relevant referral procedures are completed correctly
- 9 Agree any further information or support that is required by clients
- 10 Record details of the referral in the appropriate systems

You must know (knowledge specification)

- a what information should be reviewed
- b how to present referral opportunities in a positive manner
- c the potential advantages and disadvantages of different options
- d the types of information and how much of will be sufficient for clients to make informed choices
- e what types of format suit different clients
- f how to check clients' views on the referral
- g what objections clients might have to other services
- h what actions should be taken if clients do not agree the referral
- i who can provide additional information or support
- j what the time scales are for different types of referral
- k what the responsibilities of the services and of the clients are
- l the relevant rules relating to confidentiality
- m what information has to be transferred
- n the procedures for referral
- o what information has to be transferred
- p what types of support clients require
- q who might provide additional information or support
- r what the systems are for recording referrals and the procedures for using these
- s why it is important to use the systems

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG21

Unit Title: Provide and maintain information materials for use in the service

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. leaflets, posters, directories and listings, computer-based media.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Ensuring that service information materials comply with legislative and other requirements, and the consequences of non compliance.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. evidencing the improvement of information materials.

Unit AG 21

Provide and maintain information materials for use in the service

Element 21.1

Identify the requirements for information materials in the Service

You must be able to (performance criteria)

- 1 Review the information materials currently used by the service and its clients

- 2 Assess how the information materials comply with relevant legislation, codes of practice, guidelines, and ethical requirements

- 3 Identify clearly the way the information materials are used
- 4 Consult with all relevant sources on the effectiveness of the information materials currently used

- 5 Explore the future requirements for information materials

- 6 Identify any trends or developments in the dissemination of information materials

You must know (knowledge specification)

- a what types of information materials are used
- b which aspects of the service do they cover
- c who the clients are who use information materials
- d what format the information materials are in
- e who should be involved in the review of the information materials

- f the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- g why it is important to comply with different requirements
- h what the consequences are of not complying with different requirements
- i how to obtain information on the requirements

- j how many people use the information materials
- k who the clients of the information materials are
- l who can provide information on the use of materials
- m which criteria should be used for evaluating information sources
- n who can provide information on the use of the information materials

- o which potential clients would use the information materials
- p what the potential future requirements of the information materials might be
- q what the seasonal or other variations in demand for information materials might be
- r who can provide information on future requirements

- s what types of trends or developments might occur

	t	how to assess the impact of information and communication technologies
7	Identify the resources available for obtaining the information materials	u which resources might be available v what the constraints of the resources are
8	Specify clearly the information materials that should be obtained	w who requires information on the information materials being obtained

Unit AG 21

Provide and maintain information materials for use in the service

Element 21.2

Obtain information materials for use in the service

You must be able to (performance criteria)

- 1 Determine suitable methods to obtain the information materials
- 2 Comply with procedures for accessing and obtaining information materials
- 3 Ensure the information materials comply with relevant legislation, codes of practice, guidelines, and ethical requirements
- 4 Agree realistic time scales and resources for obtaining the information materials
- 5 Obtain suitable information materials that contribute to the service
- 6 Identify any problems with obtaining the information materials
- 7 Record and store the information materials in the appropriate systems

You must know (knowledge specification)

- a what methods could be available for obtaining information materials
- b what the organisational guidelines and procedures are for accessing and obtaining information materials
- c the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- d why it is important to comply with different requirements
- e what the consequences are of not complying with different requirements
- f how to obtain information on the requirements
- g which factors might affect the time scales for obtaining information materials
- h which resources are required for obtaining information materials
- i how to assess the information materials' contribution to the service
- j what types of problem could occur
- k what actions can be taken to address them
- l why it is important to address problems
- m what the implications are of not addressing the problems
- n what the systems for recording and storing information materials are and the procedures for using these
- o why it is important to use the systems

Unit AG 21 Provide and maintain information materials for use in the service

Element 21.3 Maintain and improve the use of information materials in the service

You must be able to (performance criteria)

- 1 Maintain sufficient sources of freely available information materials to meet the requirements of clients
- 2 Protect information sources effectively from damage and inappropriate use or alteration
- 3 Review all the relevant information collected on the effectiveness of the information materials
- 4 Identify any aspects of the information materials that could be improved
- 5 Assess the overall effectiveness of the information materials against the agreed evaluation criteria
- 6 Identify the most appropriate methods for improving the information materials
- 7 Identify the resources required to implement the improvements
- 8 Present a clear rationale for the improvements and support it with suitable evidence
- 9 Consult with all relevant people on the improvements
- 10 Record the results of the consultation in the appropriate systems
- 11 Ensure the proposed improvements comply with legislation, codes of practice, guidelines, and ethical requirements

You must know (knowledge specification)

- a how often the information materials/ sources should be updated
- b who should be involved in reviewing the information materials and sources
- c how to protect different types and formats of information materials and sources
- d the potential types of damage which could occur to information materials
- e how information sources could be inappropriately used or altered
- f what information can be collected on the effectiveness of the information materials
- g which aspects of the information materials have the potential to be improved
- h how to assess the effectiveness of the information materials
- i what the evaluation criteria are for the effectiveness of the information materials
- j how to improve different types of information materials
- k what types of improvement could be suggested
- l which resources are required to implement different types of improvement
- m why it is important to provide a clear rationale for improvements
- n what types of evidence may be necessary to support the rationale for improvements
- o who should be consulted on improvements to information materials
- p what the systems are for recording evaluations and the procedures relating to the use of these
- q why is it important to use the systems
- r the relevant national, local, professional and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- s why it is important to comply with different

requirements

- t what the consequences are of not complying with different requirements
- u how to obtain information on the requirements

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: AG27

Unit Title: Facilitate learning in groups

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. learning activities, records.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. progress records.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. different learning styles.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. Use of the key theoretical models of group work to maintain effective group dynamics.

Unit AG 27 Facilitate learning in groups

Element 27.1 Manage group dynamics

You must be able to (performance criteria)

- 1 Maintain learning within the group through the use of facilitating, managing and intervening skills
- 2 Establish a balance between the tasks to be accomplished and the group process
- 3 Encourage group members to participate effectively and ensure that they feel comfortable
- 4 Establish and maintain an appropriate manner, level and pace of communication with group members
- 5 Constructively challenge any stereotyping of individual roles and behaviours in the group
- 6 Appropriately challenge any excluding or discriminatory behaviour or language
- 7 Enhance learning through the constructive use of power, authority and influence
- 8 Deal with conflict within the group in a way which maintains the ability of group members

You must know (knowledge specification)

- a how to identify facilitation and intervening skills are and when to use them
- b how to balance the needs of tasks and group processes
- c how learning and group processes impact on each other
- d how to put learners at ease
- e how to interpret non-verbal communication
- f how to address individual needs in a group setting
- g what factors are likely to affect learning and behaviour in groups
- h how to address individual needs in a group setting
- i what the key theoretical models of group work are
- j how to form and maintain close groups
- k what the issues of equality and of opportunity and non-discriminatory practice in relation to group work are
- l how to recognise and deal with issues of power and authority in groups

Unit AG 27 Facilitate learning in groups

Element 27.2 Facilitate collaborative learning

You must be able to (performance criteria)

- 1 Agree the purpose, process and intended outcome of group activity with the group
- 2 Adapt group activities to the size and composition of the group
- 3 Manage the timing and pace of group activities effectively
- 4 Use adaptations and interventions effectively to improve the learning process
- 5 Explore with the group any factors which contribute to the ability to learn of the individual members
- 6 Encourage group members to reflect on the way in which they have been learning and participating in the group
- 7 Monitor the progress of individual group members in a sensitive manner
- 8 Give timely feedback on progress made and the process of learning to the group and to individual members in a positive and encouraging manner
- 9 Manage group dynamics effectively

You must know (knowledge specification)

- a how to balance the needs of tasks and group processes
- b how learning and group processes impact on each other
- c what different learning activities are available
- d how to sequence and pace information and gauge appropriateness of language for individual learners
- e how to identify facilitation and intervening skills are and when to use them
- f what different learning styles there are
- g how to put groups at ease
- h what the methods of eliciting personal views are and how to use these
- i how to monitor learner's progress in a group setting
- j what resources and support are available for learners
- k what the key theoretical models of group work are

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: Unit A

Unit Title: Ensure your own actions reduce risks to Health and Safety

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

In your evidence for:

Element 1 you must show that you are able to deal with a **minimum of 2 types of risk** from the identified 6 risks

Element 2 you must show evidence that you have followed a **minimum of 4 types of workplace policy**

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. health and safety check list, accident/incident logs, reports.

- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.
- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Procedures for reporting hazards and risks.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. Impact of the Health and Safety at Work Act 1974 on your work role.

Unit 'A': Ensure your own actions reduce risks to health and safety

Element 1.1 Identify the hazards and evaluate the risk in your workplace

You must be able to (Performance Criteria)

- 1 Correctly name and locate the persons responsible for health and safety in the workplace
- 2 Identify which workplace policies are relevant to your working practices
- 3 Identify those working practices in any part of your job roles which could harm yourself or other persons
- 4 Evaluate which of the potentially harmful working practices and the potentially harmful aspects of the workplace are those with the highest risk to you or to others
- 5 Report those hazards which present a high risk to the persons responsible for health and safety in the workplace
- 6 Deal with the hazards with low risks in accordance with workplace policies and legal requirements

Unit 'A': **Ensure your own actions reduce risks to health and safety**

Element 1.2 Reduce the risks to health and safety in your workplace

You must be able to (performance criteria)

- 1 Carry out your working practices in accordance with legal requirements
- 2 Follow the most recent workplace policies for your job role
- 3 Rectify those health and safety risks within your capability and the scope of your job responsibilities
- 4 Pass on any suggestions for reducing risks to health and safety within your job role to the responsible person
- 5 Ensure that your personal conduct in the workplace does not endanger the health and safety of yourself or other persons
- 6 Follow the workplace policies and suppliers' or manufacturers' instructions for the safe use of equipment materials and products
- 7 Report any differences between workplace policies and suppliers' or manufacturers' instructions as appropriate
- 8 Ensure your personal presentation at work
 - a ensure the health and safety
 - b meets any legal duties, and
 - c is in accordance with workplace policies

Unit 'A': Ensure your own actions reduce risks to health and safety

What you must know (knowledge specification)

- 1 Your legal duties for health and safety in the workplace
- 2 Your duties for health and safety as defined by any specific legislation covering your job role.
- 3 Agreed workplace policies relating to controlling risks to health and safety
- 4 Responsibilities for health and safety in your job description
- 5 The responsible persons to whom you report health and safety matters.
- 6 What hazards may exist in your workplace
- 7 The particular health and safety risks which may be present in your own job role and the precautions you must take
- 8 The importance of remaining alert to the presence of hazards in the whole workplace
- 9 The importance of dealing with or promptly reporting risks
- 10 The requirements and guidance on the precautions
- 11 The specific workplace policies covering your job role
- 12 Suppliers' and manufacturers' instructions for the safe use of equipment, materials and products
- 13 Safe working practices for your own job role
- 14 The importance of personal presentation in maintaining health and safety in the workplace
- 15 The importance of personal conduct in maintaining the health and safety of yourself and others
- 16 Your scope and responsibility for rectifying risks
- 17 Workplace procedures for handling risks which you are unable to deal with

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: W6

Unit Title: Ensure your actions contribute to a positive and safe working environment

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation:** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony:** Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. risk records, reports, complaints records.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. recognising situations that may lead to violence from clients and fellow workers.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. the importance of effective communication skills and good working relationships.

Unit W6: Ensure your actions contribute to a positive and safe working environment

Element 6.1 Identify the risk of violence in your working environment

You must be able to (performance criteria)

- 1 Review your job role and responsibilities to identify aspects which present a risk of violence to yourself or other people
- 2 Identify which aspects of your organisation's policy on preventing work-related violence and risk assessment are relevant to you and your work
- 3 Review your organisation's procedures to check they cover all situations you have to face at work and inform the responsible person about any gaps
- 4 Identify potential triggers that may escalate behaviour towards violence within: your working environment your job role the actions of other people who work alongside you the circumstances of the service-users with whom you normally expect to work your own actions whilst at work
- 5 Familiarise yourself with the procedures to follow if an incidence of violence occurs
- 6 Clearly and accurately record all the risks of violence you have identified, the measures in place for those risks and report any issues to the responsible person
- 7 Seek clarification regarding procedures for recording violence if necessary

Unit W6: Ensure your actions contribute to a positive and safe working environment

Element 6.2 Reduce the risk of violence in your working environment

You must be able to (performance criteria)

- 1 Ensure you keep yourself up-to-date with current information, relevant to your working environment, on:
 - a. possible causes of violent behaviour
 - b. what you could do to stop violence happening
 - c. who else could help you
 - d. what to do should an incident occur
- 2 when preparing to provide a work activity consider whether you need
- 3 perform your job role and responsibilities to organisational requirements, standards and expectations
- 4 Ensure the information and support you provide is appropriate for the circumstances
- 5 Respond to requests for your assistance in a prompt and courteous manner
- 6 Treat service-users and other people who work alongside you in a way that: shows respect for their views and opinions promotes goodwill
- 7 Ensure that undertakings made to service-users and other people at work are achievable and honour commitments made within the agreed timescales
- 8 Respond to complaints promptly and follow-up complaints in accordance with organisational policy and procedures
- 9 Resolve difficulties in relationships in a prompt, fair and polite manner, and report outstanding difficulties to the relevant person
- 10 Monitor your own and other's health and safety at work and report any concerns to the relevant person

Unit W6: Ensure your actions contribute to a positive and safe working environment

You must know and understand (knowledge specification)

- 1 Your legal duties for ensuring your well-being, safety and health in the workplace as explained by relevant legislation pertaining to health and safety at work
- 2 The contents of the relevant organisational policy and procedures and their requirements and implications upon your work, lines of communication and accountability
- 3 Your job role, responsibilities and limitations
- 4 Your capabilities and how and when you should report problems to other people
- 5 How to recognise challenging and unacceptable behaviour and where you may be at risk of changes in behaviour which may trigger violence from service-users or other people who work alongside you
- 6 The safe working practices for your own job role
- 7 The importance of personal conduct in maintaining a healthy, safe and positive work environment
- 8 Adjusting the amount and type of communication appropriate to the needs of the service-users and other people who work alongside you
- 9 The importance of developing positive working relationships with service-users and other people who work alongside you, in terms of the effect of the working environment and for reducing risks of violence
- 10 The importance of considering and listening to other people's views and opinions
- 11 The organisation's requirements, standards and expectations of your performance

Unit Evidence Requirements

Qualification Title: Advice and Guidance

Unit Number: L11

Unit Title: Enable learning through demonstrations and instruction

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit.

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Required sources of performance and knowledge evidence:

Observation is the required assessment method to be used to evidence some part of each element in this unit. Your assessor will observe you in real work activities and this is likely to provide most of the evidence for the performance criteria for the elements in this unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.

Other sources of performance and knowledge evidence:

The following performance criteria may be difficult to evidence by observation because it refers to contingencies or infrequently occurring activities:

L11 performance criteria 9, 15

In addition to the observation(s) your assessor will identify other sources of evidence from the list below to ensure that any outstanding performance criteria and knowledge requirements are met and that your performance is consistent.

- **Witness Testimony:** Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in

your portfolio.

- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.
- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. questioning on how to deal with distractions and disruptions.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit.

Unit L11: Enable learning through demonstrations and instructions

You must be able to (performance criteria)

- 1 Base the demonstration on an analysis of the skills needed and the order they must be learned in
- 2 Ensure that the demonstration is accurate and realistic
- 3 Structure the demonstration is accurate and realistic
- 4 Encourage learners to ask questions and get explanations at appropriate stages in the demonstration
- 5 Give learners the opportunity to practice the skill being demonstrated and give them positive feedback
- 6 Give extra demonstrations of the skills being taught to reinforce learning
- 7 Ensure that demonstrations take place in a safe environment and allow learners to see the demonstrations clearly
- 8 Respond to the needs of learners during the demonstration
- 9 Reduce distractions and disruptions as much as possible
- 10 Match instruction to the needs of the learners
- 11 Identify which learning outcomes will be achieved through instruction
- 12 Ensure that the manner, level and speed of the instruction encourages learners to take part
- 13 Regularly check that learners understand and adapt instruction as appropriate
- 14 Give learners positive feedback on the learning experience and the outcomes achieved
- 15 Identify anything that prevents learning and review this with the learners

Unit L11: Enable learning through demonstrations and instructions

You need to know (knowledge specification)

The nature and role of demonstrations and instruction:

- 1 The separate areas of demonstration which encourage learning
- 2 Which types of learning are best achieved and supported through demonstrations
- 3 How to identify and use different learning opportunities
- 4 How to structure demonstrations and instruction sessions
- 5 How to choose from a range of demonstration techniques

Principles and concepts:

- 6 How to put learners at their ease and encourage them to take part
- 7 How to choose between demonstration and instruction as learning methods
- 8 How to identify individual learning needs
- 9 Which factors are likely to prevent learning and how to overcome them
- 10 How to check learners' understanding and progress
- 11 How to put information in order and decide whether the language you will be using is appropriate for the learners
- 12 How to choose and prepare appropriate materials, including technology based materials
- 13 The separate areas of instructional techniques which encourage learning
- 14 Which types of learning are best achieved and supported through instruction

External factors influencing human resource development:

- 15 How to make sure everybody acts in line with health, safety and environmental protection legislation and best practice
- 16 How to analyse and use developments in learning and new ways of delivery, including technology-based learning

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