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**Overview**

This standard is about working with clients to enable them to plan and take action to achieve an outcome. It involves helping clients to be clear about what they want to achieve and enabling them to plan and implement a course of action. You will work with clients to identify the options available to them, the implications of particular courses of action and any potential obstacles. You will support them to reach decisions and plan the implementation of decisions. You will also support clients to review and amend plans in the light of changing circumstances.

**There are three elements**

- 1 Support clients to identify options to meet their needs
- 2 Plan action with clients
- 3 Review progress and revise plans with clients

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**Performance  
criteria**

**Support clients to identify options to meet their needs**

- You must be able to:
- P1 explain the services you are able to provide to clients in line with organisational requirements
  - P2 explain accurately the organisation's policy on record keeping and confidentiality
  - P3 create a setting that meets clients' comfort needs to enable them to identify and explore their requirements and their ideas for achieving them
  - P4 agree needs that cannot be met in line with organisational requirements and:
    - P4.1 signpost or refer clients to alternative sources of support and advice
  - P5 confirm and review clients' needs to identify their key issues
  - P6 identify through collaboration with clients a range of options to achieve their needs in line with organisational requirements
  - P7 provide accurate information on options and their key features, including:
    - P7.1 potential consequences
    - P7.2 advantages and disadvantages to clients
  - P8 check clients' understanding of their options in line with organisational requirements

**Plan action with clients**

- You must be able to:
- P9 prioritise key objectives and stages of action plans with clients in line with their situation
  - P10 identify potential methods for implementing action plans in line with organisational requirements
  - P11 support clients to select methods that are most likely to be effective in meeting their needs
  - P12 develop with clients action plans that specify the methods, key dates and responsibilities for meeting their needs
  - P13 ensure clients understand what they have to do to take action plans forward
  - P14 provide a rationale for significant changes to action plans

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- P15 agree action plans with clients in line with organisational requirements
- P16 review the content of action plans with clients in line with organisational requirements
- P17 agree the process for reviewing progress to identify any further activities necessary to meet clients' needs
- P18 record details about action plans in line with organisational requirements

#### **Review progress and revise plans with clients**

- You must be able to:
- P19 provide suitable opportunities for clients to review progress and achievements against key dates
  - P20 agree with clients the objectives that have and have not been achieved in line with organisational requirements
  - P21 identify potential revisions to action plans that will achieve the objectives of clients
  - P22 produce revised action plans with clients in the agreed format with the necessary supporting documentation
  - P23 agree revised action plans with clients in line with organisational requirements
  - P24 record reviews of action plans in line with organisational requirements

**Knowledge and understanding**

You need to know and understand:

- K1 the services the organisation can provide and ways of supporting clients to access them
- K2 the organisation's policies on record keeping and confidentiality relevant to clients and why it is important to explain these to clients
- K3 how to make the setting feel friendly and welcoming, within organisational constraints
- K4 how to help clients discuss their needs and ideas
- K5 organisational policies on what needs can and cannot be met
- K6 what other sources of support or advice are available to clients
- K7 the range of options that are available to clients and when they may be appropriate
- K8 why you should confirm options with clients
- K9 how different options might meet different clients' needs
- K10 the relevant national, local, professional and organisational requirements relating to:
  - K10.1 equal opportunities
  - K10.2 discrimination
  - K10.3 health and safety
  - K10.4 security
  - K10.5 confidentiality
  - K10.6 data protection
  - K10.7 conflicts of interest
- K11 the importance of complying with national, local, professional and organisational requirements
- K12 how to establish and prioritise key objectives and stages
- K13 how to help clients to plan action
- K14 the range of methods available for implementing different courses of action and their effectiveness
- K15 why it is important to agree methods with clients
- K16 the range of factors that might affect the feasibility of plans
- K17 what the potential methods, timescales and responsibilities are for meeting different needs

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- K18 how to identify key dates, record and act within them
- K19 how to incorporate methods, timescales and responsibilities into plans
- K20 the types of change to action plans that may be required and why it is important to provide a rationale for any changes
- K21 what different formats may be used for action plans
- K22 the type of supporting documentation that may be required when supporting clients
- K23 the relevant models of good practice for helping clients to review progress and achievement
- K24 how often to review progress and achievement
- K25 how to summarise actions that have taken place
- K26 how to review key objectives and stages of plans
- K27 why it is important to identify achievements
- K28 how to identify when objectives have been met
- K29 organisational systems and procedures for recording action plans and the importance of using these systems

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#### Additional Information

##### Skills

The skills you will enable you to deliver the service effectively are:

- 1 recording and storing information
- 2 presenting information
- 3 active listening
- 4 questioning
- 5 summarising
- 6 decision making
- 7 problem solving
- 8 challenging
- 9 negotiating
- 10 giving constructive feedback

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**Originating organisation** Skills for Justice

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**Relevant occupations** Legal Advisers; Legal Associate Professionals

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**Suite** Legal Advice

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**Key words** Plan and implement decisions; revise plans; support; review; course of action; action plan; compliance