

## Unit Title

### LA6 Support clients to plan, implement, and review action

## Summary

This Unit is for you if your role is to work with clients to enable them to plan and take action to achieve an appropriate outcome. It will involve you in 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 those decisions. You will also support clients to review and amend plans in the light of circumstances.

The Unit requires you to:

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

There are 3 elements:

No	Title
LA6.1	Support clients to identify options to meet their needs
LA6.2	Plan action with clients
LA6.3	Review progress and revise plans with clients

This is a new Unit that has been developed for the Independent Legal Advice Sector. It has been developed in the format agreed for the NOS for Legal Advice.



**Element****LA6.1 Support clients to identify options to meet their needs****Performance Criteria**

To meet the standard, you must be able to:

- 1 Explain the services you are able to provide and support the client to access the relevant service
- 2 Explain clearly the organisation's policy on record keeping and confidentiality
- 3 Create a setting in which clients feel comfortable enough to identify and explore their needs and their ideas for achieving them
- 4 Identify and agree needs that cannot be met and signpost or refer clients to additional or alternative sources of support or advice
- 5 Confirm and review clients' needs to identify the key issues
- 6 Identify a relevant range of options for achieving clients' needs and encourage the client's involvement in the process where possible
- 7 Provide clear information on the options and their key features, outlining any potential consequences, advantages and disadvantages to clients
- 8 Check clients' understanding of the options
- 9 Comply with all relevant legislation, codes of practice, guidelines and ethical requirements

**The skills you will need to enable you to deliver the service effectively are**

- recording and storing information
- presenting information
- active listening
- questioning
- summarising
- decision making
- problem solving
- challenging
- negotiating
- giving constructive feedback

## Knowledge and Understanding

To meet the standard, you must know:

- a) The services the organisation can provide and ways of supporting the client to access them
- b) The organisation's policies on record keeping and confidentiality relevant to clients and why it is important to explain these to the client
- c) Ways of making the setting feel friendly and welcoming, within organisational constraints
- d) How to help clients to discuss their needs and ideas
- e) Organisational policies on what needs can and cannot be met
- f) What other sources of support or advice are available to clients
- g) The range of options that are available to clients and when each might be appropriate
- h) Why you should confirm options with clients
- i) How different options might meet different client needs
- j) The relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality, data protection and potential conflicts of interest; why it is important to comply with different requirements; and the consequences of non-compliance

**Element****LA6.2 Plan action with clients****Performance Criteria**

To meet the standard, you must be able to:

- 1 Identify and prioritise the key objectives and stages of the action plan with the client
- 2 Identify potential methods for implementing the plan
- 3 Support the client to select methods that are most likely to be effective and agree with them those to be adopted
- 4 Develop with the client a feasible action plan that clearly specifies the methods, key dates and responsibilities for meeting their needs
- 5 Ensure the client understands what they have to do to take the action plan forward
- 6 Provide a reasoned rationale for any significant changes to the action plan
- 7 Agree the action plan in the agreed format with the necessary supporting documentation
- 8 Review the content of the action plan with clients and agree the process for reviewing progress to identify any further activities that are necessary to meet clients' needs
- 9 Record the action plan in the appropriate systems
- 10 Comply with all relevant legislation, codes of practice, guidelines and ethical requirement

**The skills you will need to enable you to deliver the service effectively are**

- recording and storing information
- presenting information
- active listening
- questioning
- summarising
- decision making
- problem solving
- challenging
- negotiating
- giving constructive feedback
- storing and recording information

## Knowledge and Understanding

To meet the standard, you must know:

- a) How to establish key objectives and stages
- b) How to prioritise objectives
- c) How to help clients to plan action
- d) The range of methods available for implementing different courses of action
- e) What methods have proved effective
- f) Why it is important to agree the methods with clients
- g) How to check the feasibility of an action plan
- h) The range of factors that might affect the feasibility of plans
- i) What the potential methods, timescales and responsibilities are for meeting different needs
- j) How to identify key dates, record and act within them
- k) How to incorporate methods, timescales and responsibilities into a plan
- l) The types of change to an action plan that might be required and why it is important to provide a rationale for any changes to an action plan
- m) What different formats may be used for action plans
- n) The type of supporting documentation that might be required
- o) Organisational systems and procedures for recording action plans and why it is important to use the systems
- p) The relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality and data protection; why it is important to comply with different requirements; and the consequences of non-compliance

**Element****LA6.3 Review progress and revise plans with clients****Performance Criteria**

To meet the standard, you must be able to:

- 1 Provide suitable opportunities for clients to review the progress and achievements against key dates
- 2 Confirm the course of action that was taken
- 3 Review the key objectives and stages of the plan
- 4 Identify and agree with clients the objectives that have been achieved and those that have not
- 5 Identify potential revisions to action plans that will achieve the objectives of clients
- 6 Produce and confirm revised action plans with clients in the agreed format with the necessary supporting documentation
- 7 Record the action plan in the appropriate systems

**The skills you will need to enable you to deliver the service effectively are**

- recording and storing information
- presenting information
- active listening
- questioning
- summarising
- decision making
- problem solving
- challenging
- negotiating
- giving constructive feedback
- storing and recording information

## Knowledge and Understanding

To meet the standard, you must know:

- a) The relevant models of good practice for helping clients to review progress and achievement
- b) Key dates that apply in different situations
- c) How often to review progress and achievement
- d) How to summarise the actions that took place
- e) How to review key objectives and stages of the plan
- f) Why it is important to identify achievements
- g) How to identify when objectives have been met
- h) Organisational systems and procedures for recording action plans and why it is important to use the systems