



Unit AG 1 Establish communication with clients for advice and guidance

Element 1.1 Establish communication with clients

<i>You must be able to:</i>	<i>You must know:</i>
1. Introduce the service to clients in a suitable way	<ul style="list-style-type: none"> a) how to introduce the service to clients in different contexts b) how to ensure the client recognises what services are available
2. Provide clients with the appropriate time and assistance to express their requirements	<ul style="list-style-type: none"> c) what the organisational procedures are for allocating time to clients d) how to create an environment that will assist clients to express their requirements e) how to use communication skills to assist clients to express their requirements f) what constitutes a safe environment for practitioners and clients
3. Assure clients of the confidentiality of the information being obtained from them	<ul style="list-style-type: none"> g) what the limits of confidentiality are h) why it is important to assure clients of confidentiality i) why it is important to make clients aware of the limits of confidentiality
4. Take appropriate action to minimise the effect of any difficulties with communication	<ul style="list-style-type: none"> j) what the difficulties with, and barriers to, communication could be k) how to minimise the effect of any difficulties or barriers to communication l) what support there might be for minimising the effect of communication difficulties, and who can provide this
5. Identify any situations where immediate action is required to assist clients and take the appropriate action	<ul style="list-style-type: none"> m) what type of situations might occur that require immediate action n) what actions should be taken to deal with different situations



Unit AG 2 Support clients to make use of the advice and guidance service

Element 2.1 Enable clients to decide whether to use the service

You must be able to:	You must know:
1. Encourage clients to clarify their requirements and circumstances	<ul style="list-style-type: none"> a) how to encourage clients to express themselves and their requirements b) what type of information should be obtained from the client c) what difficulties can occur when clients express their requirements and circumstances
2. Identify, and provide the client with, appropriate and accurate information about the service	<ul style="list-style-type: none"> d) what information is available about the organisation and service and how to access it e) what information is appropriate for different clients f) how to assess information to ensure that it is accurate and up to date g) what types of format are suitable for different clients
3. Use the information provided to assist clients decide whether their requirements could be met by the service	<ul style="list-style-type: none"> h) how to present different types of information to clients i) how to assist clients to decide whether their requirements can be met by the service j) how to address any difficulties with the information provided
4. Clarify clients' expectations and understanding of the service and its policies	<ul style="list-style-type: none"> k) how to address different expectations l) what types of misunderstanding can occur
5. Provide clients with information on the advantages and disadvantages of using the service	<ul style="list-style-type: none"> m) what the advantages and disadvantages are n) what the consequences of using the service are for different clients
6. Provide clear information on other services that might be more suitable for meeting their requirements	<ul style="list-style-type: none"> o) which services are available p) what is offered by the other services q) how to approach other services



Unit AG 2 Support clients to make use of the advice and guidance service

Element 2.2 Agree with clients their use of the service

<i>You must be able to:</i>	<i>You must know:</i>
1. Clarify and confirm the client's requirements and how these will be met by the service	<ul style="list-style-type: none"> a) how to clarify clients' requirements b) how to match clients' requirements to the service being provided c) why it is important to confirm clients' requirements d) what the consequences are of not confirming the requirements
2. Agree the way the service will be used	<ul style="list-style-type: none"> e) what options for contact with the service are available f) how different clients may wish to use the service g) what the procedures are for using the service
3. Explain clearly the actions that are necessary to fulfil clients' requirements	<ul style="list-style-type: none"> h) what actions could be taken for different requirements i) how to explain actions to clients
4. Record contacts and agreements with clients in the appropriate systems	<ul style="list-style-type: none"> j) what the systems for recording agreements are k) why it is important to use the systems l) what the procedures relating to the use of the systems are
5. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	<ul style="list-style-type: none"> m) what the relevant national, local, professional, and organisational requirements are relating 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 2 Support clients to make use of the advice and guidance service

Element 2.3 Identify and provide the information required by clients

You must be able to:	You must know:
1. Explore with clients the reasons for their information requirements	a) the types of information clients seek and the different reasons they have for seeking it
2. Identify the information sources most appropriate to the client	b) how to assess clients' requirements and match them with current information sources
3. Confirm the information required and agree the appropriate methods for providing the information	c) why it is important to confirm the information required d) the different methods available for providing information and the different formats that can be used to present it e) why it is important to agree that the information will be provided
4. Retrieve the relevant information from the appropriate systems	f) what the systems for retrieving information are, and the procedures relating to those systems g) why it is important to use the systems
5. Check clients' understanding of the information	h) how to check clients' understanding of the information
6. Confirm with the clients that the information materials that are provided are sufficient and appropriate to their requirements	i) why it is important to check that the clients have received the information materials they require and that they are sufficient and appropriate
7. Identify any problems with providing the information and take appropriate action to address them	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
8. Refer clients to additional or alternative sources of relevant information	n) what other sources of information could help the clients and how these can be accessed
9. Agree with clients any further activities that are necessary to meet their requirements	o) what other activities might be necessary
10. Record the provision of information in the appropriate systems	p) what the systems are for recording the provision of information and the procedures relating to those systems q) why is it important to use the systems r) which procedures relate to the use of the systems



Unit AG 3 *Develop interactions with advice and guidance clients*

Element 3.1 *Enable clients to explore their issues*

<i>You must be able to:</i>	<i>You must know:</i>
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 of practice, guidelines, and ethical requirements

- r) the name of any legislative provision, or 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:	You must know:
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

<i>You must be able to:</i>	<i>You must know:</i>
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 AG 4 Interact with clients using a range of media

Element 4.1 Establish interactions with clients using a range of media

You must be able to:	You must know:
1. Respond to clients promptly according to organisational policies	a) what the procedures are for welcoming clients b) how to welcome different clients c) how to use different types of communication media
2. Respond to clients in a way that encourages them to remain connected to the service	d) how to encourage clients to stay connected
3. Identify any constraints on clients and the circumstances in which the interaction is being made	e) what type of constraints clients might face f) what the potential circumstances of the clients are
4. Provide information about the service and confirm its appropriateness to the clients	g) what information about the service should be provided h) who can be assisted by the service
5. Encourage clients to share their concerns and to focus on their requirements	i) how to encourage clients without face to face interaction
6. Assess whether there is any risks or dangers facing the clients, and take appropriate action to deal with them	j) what type of risks or dangers different clients might face k) what action should be taken to deal with different risks or dangers
7. Identify any problems with maintaining the interaction and take appropriate action to address them	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
8. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	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 Interact with clients using a range of media

Element 4.2 Sustain interactions with clients using a range of media

You must be able to:	You must know:
1. Recognise the nature of the interaction with clients	a) what type of interactions occur b) how to detect which type of interaction is occurring
2. Provide suitable opportunities for clients to sustain the interaction	c) what opportunities should be made available d) how to encourage the client to maintain the interaction
3. Encourage clients to provide additional information on their situation or requirements	e) what types of information should be obtained
4. Respond to clients' immediate requirements at each stage during the interaction	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
5. Provide suitable indications to reassure clients of continued interest	i) what types of indications are appropriate to different media
6. Provide responses according to the guidelines and procedures of the organisation	j) what the guidelines and procedures of the organisation are
7. Identify any signs of increased stress during interactions and establish their significance	k) what signs might indicate that clients are under increased stress l) the possible significance of any signs of stress
8. Identify any problems with maintaining interactions and take appropriate action to address them	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 Interact with clients using a range of media

Element 4.3 Conclude interactions with clients using a range of media

<i>You must be able to:</i>	<i>You must know:</i>
1. Provide clear information on the requirement to end the interaction	a) when interactions should be ended b) what the reasons are for ending an interaction
2. Agree with clients further actions that could be taken	c) what further actions could be taken
3. End interactions according to the guidelines and procedures of the organisation	d) what the guidelines and procedures of the organisation are
4. Identify situations where it would be dangerous or disadvantageous to the interest of clients to terminate the interaction	e) what situations are dangerous f) who could be in danger
5. Take the appropriate action to resolve dangerous situations	g) what actions should be taken to resolve dangerous situations
6. Ensure the anonymity of clients, self, and colleagues is maintained according to the procedures of the service	h) why it is important to maintain anonymity i) what the procedures of the organisation are in relation to anonymity
7. Record details of 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 relating to the use of the systems



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:	You must know:
1. Use the appropriate language and pace of communications for each client	a) What constitutes appropriate language and pace of communications
2. Explain clearly the organisation's policy on record keeping and confidentiality	b) what are the organisation's policies that are relevant to clients c) how to summarise the organisation's policies
3. Encourage clients to identify and explore their requirements and their ideas for achieving them	d) what are the relevant models of good practice for assisting clients to clarify their requirements
4. Agree the purpose and the boundaries of the interaction with the client	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
5. Offer examples of alternative means for clients to achieve their requirements	i) what alternative means are available for clients to achieve their requirements
6. Clarify and confirm clients' requirements with them	j) How to clarify requirements with clients k) why it is important to clarify requirements with clients l) why it is important to confirm requirements with clients
7. Identify any situation where immediate action is required to assist clients and take immediate action	m) what type of situations occur that require immediate action n) what actions should be taken to deal with different situations
8. Identify and agree requirements that cannot be met and facilitate access to additional or alternative sources of support	o) what other sources of support could help the clients
9. Encourage clients to establish priorities for achieving their requirements	p) how to help clients establish priorities
10. Review the interaction with the client on a regular basis to ensure it is still appropriate for them	q) how to review interaction with clients



11. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	<ul style="list-style-type: none">r) name any legislative provision, professional or organisational guidelines which underpin the performance of the activities included in this Unit and describe how you comply with theses) why it is important to comply with different requirementst) what are the consequences of not complying with different requirementsu) how to obtain information on the requirements
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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

<i>You must be able to:</i>	<i>You must know:</i>
1. Encourage clients to explore their decision making process	a) What barriers could affect the clients decision making
2. Review clients' priorities to identify their current requirements	b) How to support the client in their decision making process c) how to review clients' priorities
3. Identify any unrealistic requirements and identify possible modifications to them	d) how to determine realistic requirements e) how can requirements be modified to make them more realistic
4. Identify a suitable range of options for achieving clients' requirements	f) what is the range of options that is available g) how different options might be suitable for different clients
5. Provide clear information on the options and their key features	h) what type of information should be provided for different clients i) what are the key features of the options
6. Assist clients to interpret the information provided	j) what type of assistance might be required for clients to interpret the information provided
7. Explore the potential consequences, advantages, and disadvantages of the options to clients	k) what are the consequences, advantages, and disadvantages of different options l) how to present options to clients
8. Consider alternative means for clients to achieve their requirements	m) what alternative means could help clients achieve their requirements
9. Explore clients' views about options to 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

<i>You must be able to:</i>	<i>You must know:</i>
1. Explore clients' views about options to achieve their requirements	a) how are different clients likely to receive the options b) how to explore the options with different clients
2. Assist clients to interpret all the relevant information provided	c) What information might be provided for clients d) what type of assistance might be required for clients to interpret the information provided
3. Encourage clients to evaluate the implications of any decision	e) what are the potential implications of different decisions
4. Affirm clients autonomy in decision making	f) how to encourage clients to evaluate information g) why is it important to confirm the autonomy of clients
5. Assist clients to reach a decision on the most appropriate course of action for their requirements and personal circumstances	h) how to assist clients to reach decisions i) how to match the options to clients' particular circumstances
6. Encourage clients to review their decision-making process and their reasons for selecting the course of action	j) what are the decision-making processes that clients use
7. Identify any problems with the chosen course of action and encourage the client to take appropriate action to address them	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
8. Agree with clients any further activities that are necessary to meet their requirements	o) what other activities might be necessary
9. Encourage clients to identify any further requirements for support	p) what other types of requirement might emerge
10. Summarize the course of action and agree next steps with the client	q) how to summarize the course of action in the appropriate format for the client



11. Record summaries of the interaction in the appropriate systems	<ul style="list-style-type: none">r) what are the systems for recording summariess) why it is important to use the systemst) what are the procedures relating to the use of the systems
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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:	You must know:
1. Confirm the course of action that has been chosen	a) how to confirm the decisions of clients b) why it is important to confirm the course of action
2. Explain clearly to clients the roles and responsibilities of those involved in the chosen 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
3. Explore the potential advantages and disadvantages of the chosen course of action with clients	e) what are the potential advantages and disadvantages of different activities f) what are the difficulties in achieving the requirements of clients
4. Describe clearly the potential stages, time scales, and any cost implications of the chosen course of action	g) what are the stages and time scales of different types of activity h) what are the cost implications to all relevant parties
5. Outline the expected outcomes of each stage of the chosen course of action	i) how each stage contributes to the overall activity
6. Inform clients of the types of information that may be used during the chosen course of action	j) what types of information may be used during different courses of action
7. Identify any unrealistic expectations and explore any possible modifications to them	k) what types of unrealistic expectations might be proposed l) how these can be modified to make them more realistic
8. Provide clients with any additional relevant information they might require	m) what type of additional information is required by different clients
9. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	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

<i>You must be able to:</i>	<i>You must know:</i>
1. Incorporate all relevant information about the chosen course of action into the action plan	a) what information should be incorporated
2. Ensure the action plan clearly specifies the methods, time scale, and responsibilities for delivering clients' requirements	b) what are the methods, time scales, and responsibilities for delivering different requirements
	c) how to incorporate different methods, time scales, and responsibilities
3. Ensure the action plan is capable of being implemented	d) how to check the feasibility of the action plan
	e) what factors might affect the feasibility of the action plan
4. Produce the action plan in the agreed format with the necessary supporting documentation	f) what are the different formats for action plans
	g) what type of supporting documentation might be required
5. Review the content of the action plan with clients	h) why it is important to review 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	i) how often should the implementation process be reviewed
	j) what type of review should take place
7. Record the action plan in the appropriate systems	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:	You must know:
1. Identify and prioritise the key objectives and stages of the action plan	a) how to confirm the decisions of clients b) why it is important to confirm the course of action
2. Explore any potential difficulties in achieving the action plan	c) what are the potential difficulties of different courses of action d) how to overcome potential difficulties
3. Identify any difficulties in achieving the action plan	e) what are the potential difficulties of different courses of action f) how to overcome potential difficulties
4. Identify potential methods for implementing the course of action	g) what are the methods for implementing different courses of action
5. Assist clients to select methods that are most likely to be effective	h) what methods have proved effective
6. Agree with clients the methods to be adopted	i) why it is important to agree the methods
7. Provide a reasoned rationale for any significant changes to the action plan	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
8. Identify any requirements that cannot be met and establish alternative actions for dealing with them	l) what other actions could be taken
9. Confirm the understanding of clients and agree for the implementation of the action plan to commence	m) how to confirm the understanding of clients n) why it is important to reach agreement for the implementation to commence



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:	You must know:
1. Provide suitable opportunities for clients to review the progress and achievements of the course of action	<ul style="list-style-type: none"> 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
2. Confirm the course of action that was taken	<ul style="list-style-type: none"> d) how to establish the courses of action that were undertaken
3. Review the key objectives and stages of the course of action	<ul style="list-style-type: none"> e) how to review key objectives and stages
4. Identify and agree with clients the objectives that have been achieved and those that have not	<ul style="list-style-type: none"> 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
5. Review the suitability of the methods used by clients to implement the course of action	<ul style="list-style-type: none"> 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
6. Identify the methods that were most effective	<ul style="list-style-type: none"> l) how to assess the effectiveness of different methods m) which methods can be effective for different clients
7. Identify any issues faced during the implementation of the course of action	<ul style="list-style-type: none"> 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



<p>8. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements</p>	<p><i>q)</i> what the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection</p> <p><i>r)</i> why it is important to comply with different requirements</p> <p><i>s)</i> what the consequences are of not complying with different requirements</p> <p><i>t)</i> how to obtain information on the requirements</p>
<p>9. Provide suitable opportunities for clients to obtain feedback on progress</p>	<p><i>u)</i> what the procedures are for checking progress</p> <p><i>v)</i> how often progress should be reviewed</p> <p><i>w)</i> what types of feedback should be provided</p>



Unit AG 8 Advocate on behalf of advice and guidance clients

Element 8.1 Prepare for the advocacy

<i>You must be able to:</i>	<i>You must know:</i>
1. Review all relevant information on the requirements of the clients	a) how to obtain accurate information on the requirements of clients b) how to check the relevance of the information
2. Clarify with clients any additional information that might be required	c) how to contact clients d) what types of further information might be necessary
3. Confirm who should be contacted to pursue the interests of clients	e) which services or people are usually contacted f) who represents the services or people
4. Identify the key aspects of clients' requirements that will feature in the discussions and debates	g) how to isolate the key aspects of clients' requirements h) what types of discussions and debates could occur i) how decisions are agreed between the parties
5. Assess the potential results of the advocacy	j) what the results of previous similar advocacy are
6. Record details of the advocacy in the appropriate systems	k) the systems are for recording advocacy, and the procedures relating to their use l) why it is important to use those systems
7. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	m) the relevant national, local, professional, and organisational requirements relating 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 8 Advocate on behalf of advice and guidance clients

Element 8.2 Present clients' interests

You must be able to:	You must know:
1. Ensure all relevant people, documentation, and associated materials are available for the presentation	a) what and who should be available at different stages of the presentation
2. Provide the correct information to all relevant people according to the agreed time scales	b) who requires information c) what type of information is required
3. Ensure oral and written presentations are clear and effective	d) what information should be included in the presentations and how it should be presented
4. Present clients' interests in a way that emphasises the key aspects and how it affects clients	e) the types of key aspect that should be emphasised and how to emphasise them
5. Identify any errors or contradictions in the information relating to clients	f) why it is important to check for errors or contradictions g) what types of errors or contradictions could occur
6. Identify clearly the issues presented by others and offer constructive suggestions for their resolution	h) what types of issues could emerge i) how these types of issue have been resolved before
7. Identify any problems with the advocacy and take appropriate action to address them	j) the types of problem that 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
8. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	n) what the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection o) why it is important to comply with different requirements p) what the consequences are of not complying with different requirements q) how to obtain information on the requirements



Unit AG 9 Prepare to represent advice and guidance clients in formal proceedings

Element 9.1 Prepare clients for the formal proceedings

<i>You must be able to:</i>	<i>You must know:</i>
1. Explain to clients clearly the roles and responsibilities of those involved in the formal proceedings	a) what is involved in different types of formal proceedings b) what the roles and responsibilities are of different organisations and people
2. Describe clearly to clients the potential advantages and disadvantages of the formal proceedings	c) what the potential advantages and disadvantages are of different types of formal proceedings d) what difficulties there might be in achieving the requirements of clients
3. Describe clearly the stages, time scales, and any cost implications of the formal proceedings	e) the stages and time scales of different types of formal proceedings f) the cost implications to all relevant parties
4. Outline the expected outcomes of each stage of the representation	g) how each stage of the proceedings contributes to the overall process
5. Inform clients of the type of information that is used during the formal proceedings	h) the type of information used during different formal proceedings
6. Inform clients of the nature of the arguments that will be used to pursue a case	i) what types of argument could be used j) who is involved in making the final decision
7. Confirm the understanding of clients and secure their formal agreement for their representation to commence	k) how to confirm the understanding of clients l) why it is important to receive the formal agreement of clients m) which documents and procedures should be completed
8. Provide clients with any additional relevant information they might require	n) what types of additional information is required by different clients



Unit AG 9 Prepare to represent advice and guidance clients in formal proceedings

Element 9.2 Prepare information for the formal proceedings

<i>You must be able to:</i>	<i>You must know:</i>
1. Confirm the parties who are involved in the case	a) how to obtain information on the different parties involved
2. Obtain clear and accurate information on the case	b) how to obtain accurate information c) how to check the validity of the information
3. Ensure information is disclosed according to established procedures	d) what types of information should be disclosed e) who should receive the information f) who should provide information
4. Clarify with clients any additional information that might be required	g) how to contact clients h) what types of further information might be necessary
5. Identify any aspects of the case that might lead to a reconsideration of its outcomes	i) the types of aspects which might be identified j) what other courses of action could be adopted
6. Confirm the formal proceedings where the case will be heard and identify which parties are involved	k) which proceedings could be used l) who represents the different parties involved
7. Record details of the case in the appropriate systems	m) which systems are used for recording cases and the procedures relating to the use of those systems n) why it is important to use those systems
8. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	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 9 Prepare to represent advice and guidance clients in formal proceedings

Element 9.3 Prepare the presentation of the case

<i>You must be able to:</i>	<i>You must know:</i>
1. Identify the key aspects of the case that will feature in the arguments	a) how to identify the key aspects of a case
2. Identify a strategy for arguing the case on behalf of clients	b) what types of strategies could be used for arguing a case
3. Identify the approach to advocacy that is likely to be successful	c) what types of approach have worked in the past d) what types of approach are allowed in different types of proceeding
4. Identify the nature of the arguments that will be used	e) what types of arguments could be used f) who is involved in making the final decision
5. Decide the line of questioning that will be put to the parties involved in the case	g) what types of questions should be asked of different parties
6. Identify potential responses to the questions put by the parties	h) what types of response are usually received i) what responses are expected
7. Provide the correct information to all relevant people according to the agreed time scales	j) who requires information k) what types of information are required



Unit AG 10 Present cases for advice and guidance clients in formal proceedings

Element 10.1 Present cases for clients

You must be able to:	You must know:
1. Ensure all relevant people, documentation, and associated materials are available for the case	<ul style="list-style-type: none"> a) what and who should be available at different stages of the case b) what information should be passed to others c) what the procedures are for disclosing information d) why it is important to comply with the disclosure procedures
2. Present the case clearly and effectively	<ul style="list-style-type: none"> e) how to present different types of case f) what information should be included in the presentations
3. Identify any errors or contradictions in the information relating to clients	<ul style="list-style-type: none"> g) what type of errors or contradictions could occur h) why it is important to challenge these
4. Counter effectively the arguments of opposing parties	<ul style="list-style-type: none"> i) what type of arguments are likely j) how to challenge them
5. Identify any problems with the formal proceedings and take appropriate action to address them	<ul style="list-style-type: none"> k) what types of problem could occur l) what actions can be taken to address them m) why it is important to address problems n) what the implications are of not addressing the problems
6. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	<ul style="list-style-type: none"> 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 10 Present cases for advice and guidance clients in formal proceedings

Element 10.2 Review the outcomes of the formal proceedings

<i>You must be able to:</i>	<i>You must know:</i>
1. Review the outcomes of the formal proceedings with clients	a) what types of outcomes require explanation
2. Clarify the responses of the other parties to the outcomes of the formal proceedings	b) what types of responses from other parties should be obtained
3. Specify the consequences to the clients and others of the outcomes	c) what the likely consequences are of the outcomes
4. Identify clearly the objectives that have been achieved and those that have not	d) what the objectives are that are being sought e) what the expectations are of different clients
5. Identify the potential options for continuing the advocacy process	f) what further actions could be taken g) when the advocacy process should be concluded
6. Identify any requirements for further action	h) what types of further action might be required i) who might initiate further action
7. Record details of the formal proceedings in the appropriate systems	j) what the systems are for recording formal proceedings and the procedures relating 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 11.1 Exchange offers for clients

<i>You must be able to:</i>	<i>You must know:</i>
1. Review the requirements of clients	a) how to obtain information on clients' requirements
2. Identify a suitable negotiation strategy to achieve the requirements of clients	b) what type of negotiation strategies are suitable for different types of issue
3. Prepare suitable offers for clients that encompass their requirements	c) how to prepare offers over a period of time d) when to present new offers
4. Receive offers from other parties	e) how to receive offers
5. Assess how far the offers achieve the requirements of clients	f) how to assess offers and what different offers might signify
6. Consult with clients on the offers that have been received	g) when to consult clients
7. Recommend the next stages in the negotiations	h) the potential next stages in negotiations i) when to conclude negotiations
8. Record details of the negotiations in the appropriate systems	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:	You must know:
1. Produce agreements that effectively meet the requirements of clients	a) what different types of agreement can be reached
2. Incorporate all necessary details into the agreement	b) what types of detail should be included in the agreements
3. Ensure the agreement is capable of being implemented	c) how to check the feasibility of the agreement d) what factors might affect the agreement
4. Ensure the agreement complies with all relevant legislation, codes of practice, guidelines, and ethical requirements	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
5. Confirm agreements with clients at appropriate points in the negotiation process	i) when clients should be consulted during negotiations j) what levels of detail clients require
6. Provide a suitable rationale for any requirements that cannot be met or any significant changes to the agreement	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
7. Produce the agreement in the required formats with the necessary supporting documentation	m) what the different formats are for agreements n) what types of supporting documentation might be required
8. Record agreements in the appropriate systems	o) what the systems are for recording agreements and the procedures for using these p) why it is important to use the systems



Unit AG 12 Liaise with other services

Element 12.1 Establish procedures for exchanging information with other services

You must be able to:	You must know:
1. Identify and comply with procedures for exchanging information between services	<ul style="list-style-type: none"> 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
2. Consult with other services on the information requirements of each service	<ul style="list-style-type: none"> f) what types of information are required g) what information is required by different services
3. Agree the purpose, scope, and procedures for exchanging information	<ul style="list-style-type: none"> h) why it is important to reach agreement on the type of information exchanged
4. Identify clearly the roles and responsibilities for exchanging information	<ul style="list-style-type: none"> i) who is involved in different types of information provision
5. Identify the priorities of different services for exchanging information	<ul style="list-style-type: none"> j) what the priorities of other services are
6. Disseminate the procedures for exchanging information with other services	<ul style="list-style-type: none"> k) how to disseminate different types of procedure l) who should be informed of the procedures
7. Review regularly the procedures for exchanging information	<ul style="list-style-type: none"> m) which procedures should be reviewed n) when procedures are generally reviewed
8. Ensure the exchange of information complies with all relevant legislation, codes of practice, guidelines, and ethical requirements	<ul style="list-style-type: none"> 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

<i>You must be able to:</i>	<i>You must know:</i>
1. Confirm the information required by other services	a) what information the other services specifically require b) when other services require information by
2. Comply with the services' procedures for exchanging information	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
3. Identify the information that seems most appropriate	f) how to match the information to the requirements of other services
4. Assist other services to access and interpret the information they receive	g) where different information is held h) which factors affect the interpretation of the material
5. Confirm with the other services that the information that is provided is sufficient and appropriate to their requirements	i) why it is important to check that the other services have received the information they require
6. Provide other services with additional information on other sources of relevant information	j) what the other sources of information are k) how other services can access the information
7. Record the results of the information provision in the appropriate systems	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:	You must know:
1. Confirm the information required from other services	a) what types of information are required from the other services b) when the other services require information by
2. Comply with the services' procedures for exchanging information	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
3. Determine the methods that should be used for obtaining the information	f) the different methods that can be used for obtaining information g) which methods are appropriate for obtaining different types of information
4. Access the relevant information sources using the appropriate procedures	h) what the procedures for accessing information are i) what difficulties can occur when obtaining information
5. Obtain the information using the specified methods	j) why it is important to use the agreed methods for obtaining information
6. Confirm the validity of the information	k) how to decide whether the information is valid
7. Protect the information sources according to agreed procedures	l) why it is important to protect the information sources
8. Identify any problems with obtaining the information	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
9. Record the information accurately in the appropriate systems	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 AG 13 Enable advice and guidance clients to access referral opportunities

Element 13.1 Identify options for referral

You must be able to:	You must know:
1. Obtain information from clients on their requirements	a) what other services are available
2. Obtain clear, relevant, and current information on other services that are potentially suitable	b) how to obtain information on other services c) what information should be obtained d) what types of information are particularly useful
3. Assess the suitability of other services for meeting clients' requirements	e) what requirements might be met by other services
4. Obtain further clarification from clients when the services appear inappropriate	f) how to evaluate the suitability of other services g) what types of additional information should be obtained h) what other alternatives are available
5. Confirm the acceptance criteria and procedures of the other services	i) how to obtain information on acceptance criteria j) what the procedures of different services are
6. Review the requirements of clients and check them against the acceptance criteria of the other services	k) how to match clients' requirements against acceptance criteria
7. Ensure the other services have the capacity and resources to deal with additional clients	l) how to check the services' capacity and resources
8. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	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

<i>You must be able to:</i>	<i>You must know:</i>
1. Review the referral options with clients	a) what information should be reviewed b) how to present referral opportunities in a positive manner
2. Identify the advantages and disadvantages of the referral options for the clients	c) the potential advantages and disadvantages of different options
3. Provide sufficient information, in an appropriate format, to enable clients to make informed decisions about the referral	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
4. Establish the acceptability of the referral with clients	f) how to check clients' views on the referral
5. Provide additional information and support when required by clients	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
6. Plan the effective implementation of the referral with the client and facilitate contact with the relevant services	j) what the time scales are for different types of referral k) what the responsibilities of the services and of the clients are
7. Review the boundaries of confidentiality with clients and inform them of the information that has to be passed between the relevant services	l) the relevant rules relating to confidentiality m) what information has to be transferred
8. Ensure all relevant referral procedures are completed correctly	n) the procedures for referral o) what information has to be transferred
9. Agree any further information or support that is required by clients	p) what types of support clients require q) who might provide additional information or support
10. Record details of the referral in the appropriate systems	r) what the systems are for recording referrals and the procedures for using these s) why it is important to use the systems



Unit AG 14 Manage personal case load

Element 14.1 Record and maintain case notes

You must be able to:	You must know:
1. Record all key information about each case	a) what types of information should be recorded about cases
2. Record all actions being undertaken for clients	b) why it is important to record what is happening
3. Ensure case notes are accurate and an appropriate amount of detail	c) how to confirm that case notes are accurate d) how much detail should be included for different types of case
4. Ensure case notes are structured in a way that provides a clear case history	e) how case notes should be structured
5. Ensure case notes are legible and clear	f) why it is important that case notes are legible and clear
6. Use relevant documentation and systems to record the case notes	g) what the systems are for recording case notes and the procedures relating to the use of these h) why it is important to use the systems
7. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	i) the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection j) why it is important to comply with different requirements k) what the consequences are of not complying with different requirements l) how to obtain information on the requirements



Unit AG 14 Manage personal case load

Element 14.2 Review personal case load

You must be able to:	You must know:
1. Review all relevant information on the personal case load	a) what types of information on personal case loads should be reviewed b) how often should information on personal case loads be reviewed c) how many cases can be managed
2. Monitor the progress in achieving the required outcomes for the cases	d) how to monitor the progress of cases
3. Identify any obstacles in achieving the required outcomes for the cases	e) what type of obstacles could occur in achieving the required outcomes for the cases f) how the obstacles can be overcome
4. Identify any factors that might affect the structure or content of the case load	g) the factors that can affect the quantity of cases being managed
5. Identify any improvements that can be made to the management of the cases	h) what types of improvements could be identified to the management of the cases
6. Exchange information on the cases according to the procedures of the service	i) what types of information are involved in different types of case j) who should be provided with information on cases k) who should provide information on cases
7. Record the information on the cases in the appropriate systems	l) what the systems are for recording case information and the procedures relating to the use of these m) why it is important to use the systems
8. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	n) the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection o) why it is important to comply with different requirements p) what the consequences are of not complying with different requirements q) how to obtain information on the requirements

Unit AG 14 Manage personal case load



Element 14.3 Establish priorities for dealing with personal case load

<i>You must be able to:</i>	<i>You must know:</i>
1. Establish criteria for setting priorities for cases	a) what types of criteria could be used for setting priorities b) how to agree on the priority criteria
2. Assess cases against the specified criteria	c) how to match cases against the priority criteria
3. Identify any immediate action required to meet deadlines	d) what deadlines can occur e) what the consequences are of not meeting the deadlines
4. Specify clearly the cases that require highest priority	f) how to specify the highest priorities
5. Inform all relevant people of the need to prioritise specific cases	g) who should be informed of the priorities
6. Ensure high priority cases are implemented and assigned the appropriate resources	h) who is responsible for implementing cases i) which resources should be assigned to implementing different types of case
7. Monitor the effect of the priorities on the entire case load	j) what types of affect or distortion the priorities could have
8. Ensure all cases receive the appropriate attention within the time scales established by the service	k) what time scales are required by the service for different types of case
9. Provide a clear rationale for the priorities	l) why it is important to provide a clear rationale for priorities



Unit AG 15 Review own contribution to the service

Element 15.1 Assess own contribution to the work of the service

<i>You must be able to:</i>	<i>You must know:</i>
1. Assess own work against specified work objectives	a) how to assess own work b) what types of work objectives should be specified
2. Review relevant feedback on own work	c) what feedback on own work should be considered d) who can provide relevant feedback on own work
3. Identify own role and contribution in achieving the work objectives	e) the role of own work in the service f) the work objectives that have been set g) what factors could affect the achievement of the objectives
4. Review any actual or potential effect of own values, beliefs, attitudes, and behaviours when working	h) own values, beliefs, attitudes, and behaviours i) how own values, beliefs, attitudes, and behaviours could impact on work
5. Review the priorities assigned to different work objectives	j) how to assess the priorities assigned to own work
6. Identify how one has complied with all relevant legislation, codes of practice, guidelines, and ethical requirements	k) the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection l) why it is important to comply with different requirements m) what the consequences are of not complying with different requirements n) how to obtain information on the requirements
7. Draw suitable conclusions on how one has undertaken own work	o) why it is important to have a clear understanding of own work p) how any conclusions can be used to improve work



Unit AG 15 Review own contribution to the service

Element 15.2 Develop oneself to achieve work requirements

You must be able to:	You must know:
1. Identify realistic development objectives	a) how to identify development objectives b) what the specific development objectives are
2. Ensure the development objectives identify the competences that are appropriate to own work	c) which competences are required for work
3. Compile a personal development plan to deliver own development objectives	d) how to compile a personal development plan e) what a personal development plan should include f) what the organisational procedures for self-development are g) how a personal development plan can be used
4. Agree the personal development plan with the appropriate people	h) who can agree the personal development plan
5. Maintain relevant knowledge of the service and organisation	i) what types of knowledge are required of the service and the organisation j) what the sources of knowledge of the service and the organisation are k) how to assess the relevance of the knowledge
6. Assess the impact of any changes in the service on own work role	l) how the service has developed during the time of own personal involvement m) what type of developments might occur in the future
7. Identify and utilise suitable development opportunities	n) what types of development opportunity are available
8. Review and update personal development plans regularly to take account of changing work requirements	o) when personal development plans should be reviewed p) who might require information on the personal development plans



Unit AG 16 Evaluate and develop own contribution to the service

Element 16.1 Evaluate own practice

<i>You must be able to:</i>	<i>You must know:</i>
1. Identify suitable criteria for evaluating own practice	a) which evaluation criteria could be used b) which factors should be incorporated into the evaluation criteria
2. Review relevant information to evaluate own practice	c) what types of information on own practice is relevant d) how much information on own practice should be reviewed
3. Evaluate own practice against specified criteria	e) how to evaluate own practice against criteria
4. Review relevant feedback on own practice	f) what feedback on own work should be considered g) who can provide relevant feedback on own work
5. Identify own contribution to achieving the objectives of the service	h) what the objectives of the service are i) what factors could affect the achievement of the objectives
6. Review the effect of own values, beliefs, attitudes, and behaviours when working	j) own values, beliefs, attitudes, and behaviours k) how own values, beliefs, attitudes, and behaviours impact on practice
7. Review the priorities assigned to different work objectives	l) how to assess the priorities assigned to own work
8. Identify how one has complied with all relevant legislation, codes of practice, guidelines, and ethical requirements	m) the relevant national, local, professional, and organisational requirements are 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
9. Draw suitable conclusions on how one has undertaken own practice	q) why it is important to have a clear understanding of own practice r) how any conclusions can be used to improve work



Unit AG 16 Evaluate and develop own contribution to the service

Element 16.2 Ensure continuing self-development

<i>You must be able to:</i>	<i>You must know:</i>
1. Identify realistic development objectives and establish their priority	a) how to identify development objectives b) what the specific development objectives are c) which criteria should be used to prioritise development objectives
2. Ensure the development objectives identify the competences that are appropriate to the work of the service	d) which competences are required for the work of the service
3. Devise a personal development plan to deliver own development objectives	e) how to devise a personal development plan f) what a personal development plan should include
4. Maintain and update relevant knowledge of the service, organisation, sector, and profession	g) what types of knowledge are required of the service, organisation, sector, and profession h) the relevant and current sources of knowledge of the service, organisation, sector, and profession i) how to assess the relevance of the knowledge
5. Identify any developments that can be effectively incorporated into own practice	j) what types of developments in theory, research, and practice might be relevant k) how these can be incorporated into own practice
6. Assess any trends and developments in the work of the sector that have an impact on own practice	l) how the sector has developed m) what types of development will occur in the future
7. Agree the personal development plan with the appropriate people and secure sufficient resources to implement it	n) who can agree the personal development plan o) what resources are required to implement the personal development plan
8. Identify and utilise suitable development opportunities	p) what types of development opportunity are available q) how to assess the benefits of training and other forms of development
9. Record the personal development plans in the appropriate systems	r) what the systems are for recording personal development plans and what the procedures are that relate to the use of these



	<i>s)</i> why it is important to use the systems
10. Review and update personal development plans regularly to take account of changing practice and other factors	<i>t)</i> when personal development plans should be reviewed
	<i>u)</i> who might require information on the personal development plans



Unit AG 17 Provide support for other practitioners

Element 17.1 Agree to support other practitioners

You must be able to:	You must know:
1. Explore the purpose and boundaries of the support of other practitioners	a) what types of support can be provided to other practitioners b) the different purposes and boundaries of each type of support
2. Ensure the supervision of specific practitioners is appropriate to both parties	c) which practitioners should be supported d) what the reasons for not supporting practitioners are
3. Review with practitioners the methods for providing the support	e) which methods of support are available f) how to review the methods of support
4. Agree the procedures and limits relating to the exchange of information and confidentiality	g) what the potential procedures and limits are that relate to the exchange of information and confidentiality
5. Clarify options for resolving issues relating to support	h) what the options are for resolving issues i) which are most effective options with different practitioners
6. Agree with practitioners to implement the support	j) how to reach agreements with practitioners
7. Agree with practitioners when to review the support	k) how often the support should be reviewed
8. Record the support agreement in the appropriate systems	l) what the systems are for recording support agreements and the procedures for using these m) why it is important to use the systems



Unit AG 17 Provide support for other practitioners

Element 17.2 Promote the effective practice of practitioners

You must be able to:	You must know:
1. Assist practitioners to identify and work within the limits of their own competence	<ul style="list-style-type: none"> a) who is being supported b) what the typical limits of competence of practitioners are c) what the organisations expectations of practitioners are
2. Enable practitioners and services to monitor the effectiveness of their work with clients	<ul style="list-style-type: none"> d) how practitioners can monitor work with clients e) which criteria can be used for measuring effectiveness
3. Intervene in a timely and appropriate manner in order to maintain practitioners' effectiveness	<ul style="list-style-type: none"> f) when to intervene in order to maintain practitioners' effectiveness g) how to intervene in order to maintain practitioners' effectiveness
4. Provide practitioners with regular feedback on their performance	<ul style="list-style-type: none"> h) when to provide feedback to practitioners i) how to provide constructive feedback to practitioners
5. Assist practitioners to clarify and manage any tensions between work and personal issues	<ul style="list-style-type: none"> j) what type of tensions between work and personal issues can arise k) how far to get involved in resolving tensions
6. Identify any issues requiring immediate attention and take appropriate action to assist their resolution	<ul style="list-style-type: none"> l) what type of issues might require immediate attention m) what actions should be taken assist the resolution of issues
7. Assist practitioners to comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	<ul style="list-style-type: none"> n) the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection o) why it is important to comply with different requirements p) what the consequences are of not complying with different requirements q) how to obtain information on the requirements



Unit AG 17 Provide support for other practitioners

Element 17.3 Deliver support sessions to practitioners

You must be able to:	You must know:
1. Identify any time or other constraints on the support session	a) what types of constraint could affect the support session
2. Identify clearly the issues to be covered in the support session	b) what types of issues should be covered in the support session
3. Enable practitioners to reflect on their practice and the issues that affect the practice	c) why it is important for practitioners to reflect on their practice d) how practitioners can reflect on their practice
4. Provide constructive feedback on the work of practitioners	e) what type of feedback is constructive
5. Explore with practitioners the effectiveness of their work	f) how to assess the effectiveness of work of practitioners
6. Assist practitioners to identify any specific requirements for support or development	g) what types of specific requirements could occur
7. Identify suitable options for meeting the specific requirements of practitioners	h) what the options are available for meeting the specific requirements of practitioners i) how to match options with practitioners
8. Review regularly support sessions and identify potential improvements	j) when to review support sessions k) what types of improvement could be made to support sessions
9. Record the session outcomes in the appropriate systems	l) what the systems for recording session outcomes are and what the procedures are that relate to the use of these m) why it is important to use the systems



Unit AG 18 Operate within networks

Element 18.1 Maintain memberships of networks

You must be able to:	You must know:
1. Identify networks that could be used to the benefit of the service	a) what types of network exist b) which networks have been used before
2. Ensure the networks meet own and the service's criteria for participation	c) what the service's criteria are for participation in networks
3. Ensure the networks comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	d) the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection e) why it is important to comply with different requirements f) what the consequences are of not complying with different requirements g) how to obtain information on the requirements
4. Ensure own contributions to the networks are constructive and effective	h) how much time should be devoted to the networks i) how to ensure the time is used well j) how to be constructive k) what levels of involvement should occur
5. Identify and resolve any potential conflict of interest between the network and the service	l) what types of conflict of interest could occur m) what to do when conflicts of interest occur
6. Maintain personal contacts within the network to ensure effective co-operation	n) who to maintain contact with o) how to reciprocate with others
7. Identify any problems with networks and take appropriate action to address them	p) what types of problem could occur q) what actions can be taken to address them r) why it is important to address problems s) what the implications are of not addressing the problems



Unit AG 18 Operate within networks

Element 18.2 Exchange information within networks

You must be able to:	You must know:
1. Identify the appropriate people who can exchange information	a) who can provide information within the network
2. Ensure the information that is exchanged is accurate and suitable to the purpose for which it is required	b) what information is required by network members c) what the information is used for d) how to assess the accuracy of information
3. Ensure the people are clearly briefed on the exchange of information	e) who should know about the exchange of information
4. Agree a realistic time scale for exchanging the information	f) what would be a realistic time scale for the exchange of different types of information
5. Ensure the exchange of information complies with all relevant legislation, codes of practice, guidelines, and ethical requirements	g) the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection h) why it is important to comply with different requirements i) what the consequences are of not complying with different requirements j) how to obtain information on the requirements
6. Provide suitable feedback on the contribution of the network to the work of the service	k) how feedback has improved the use of networks
7. Record the information that has been exchanged in the appropriate systems	l) what the systems are for recording the exchange of information and the procedures relating to the use of these m) why it is important to use the systems



Unit AG 19 Undertake research for the service and its clients

Element 19.1 Identify sources and availability of information

You must be able to:	You must know:
1. Identify clearly the type and range of information required	a) what types of information are required
2. Identify and evaluate the sources of information for their contribution to the research	b) what the potential sources of information are
3. Approach sources of information with a clear explanation of the purpose of the research	c) how the sources of information have co-operated in the past d) why it is important to be clear about the research being undertaken
4. Ascertain clearly the procedures that are required to access the information	e) what the access procedures for different types of information are f) the rules of confidentiality relating to different types of information
5. Specify clearly any risks to the sources of information from the research	g) what the different risks are that should be considered h) how to minimise the effects of any risks
6. Identify any problems with the collection of necessary information and take appropriate action to deal with them	i) what the types of problem are that could occur j) what actions can be taken to address them k) why it is important to address problems l) what the implications are of not addressing the problems
7. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	m) the relevant national, local, professional, and organisational requirements are 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 19 Undertake research for the service and its clients

Element 19.2 Collect information to achieve research objectives

You must be able to:	You must know:
1. Access the sources of information according to agreed procedures	a) what the agreed procedures are for accessing information
2. Collect information in line with the requirements of the research	b) which information collection procedures are required
3. Apply information collection methods correctly and consistently	c) why it is important to apply the collection methods correctly and consistently d) what the consequences are of not applying the collection methods correctly and consistently
4. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	e) the relevant national, local, professional, and organisational requirements are that relate 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
5. Identify any problems with the collection of necessary information and take appropriate action to deal with them	i) what types of problem could occur j) what actions can be taken to address them k) why it is important to address problems l) what the implications are of not addressing the problems
6. Record the collected information in the appropriate systems	m) what the systems are for recording information and the procedures relating to the use of these n) why it is important to use the systems



Unit AG 19 Undertake research for the service and its clients

Element 19.3 Analyse information collected from the research

<i>You must be able to:</i>	<i>You must know:</i>
1. Ensure the analysis methods are appropriate to the information and the aims of the research	a) which analysis methods could be used b) what analysis methods have proved most useful in the past
2. Analyse information accurately according to the appropriate methodology	c) how to use the analysis methods
3. Interpret and synthesise the results carefully, and draw suitable conclusions	d) how to present research results e) why it is important to provide a rationale for the results
4. Identify any unexpected results and suggest reasons for them	f) what types of result are expected g) the possible reasons for unexpected results
5. Record the results of the analysis in the appropriate systems	h) what the systems for recording analysis results are and the procedures that relate to the use of these i) why it is important to use the systems
6. Review the progress of the research with the relevant people wherever possible	j) who should be involved in reviewing the research



Unit AG 19 Undertake research for the service and its clients

Element 19.4 Report the results of the research

<i>You must be able to:</i>	<i>You must know:</i>
1. Present the results of the research in a manner appropriate to its aims and objectives	a) how to present different types of research results
2. Acknowledge appropriately all sources of information	b) who should be acknowledged in the research
3. Review the results of the research with the relevant people wherever possible	c) who should be involved in reviewing the research
4. Protect confidential information in accordance with agreements and procedures	d) what types of information sources should be protected e) what types of information might be confidential
5. Evaluate the success of the research against the specified evaluation criteria	f) what the criteria are for evaluating the success of the research
6. Record the results of the research in the appropriate systems	g) what the systems are for recording research results and the procedures that relate to the use of these h) why it is important to use the systems
7. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements	i) the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection j) why it is important to comply with different requirements k) what the consequences are of not complying with different requirements l) how to obtain information on the requirements



Unit AG 20 Design information materials for use in the service

Element 20.1 Identify the objectives of the information materials

You must be able to:	You must know:
1. Obtain suitable information on the overall requirements for the information materials	a) the different methods for obtaining information materials b) what types of information materials are required
2. Identify the purpose and scope of the information materials	c) what the objectives of the information materials are
3. Identify the different clients using the information materials	d) who is likely to use the information materials e) who can provide information on users
4. Confirm the particular requirements of different clients	f) how clients' requirements are likely to differ from each other
5. Confirm the life cycle of the information materials	g) how the information materials will be used throughout their life cycle h) the different life cycles that different types of information materials have
6. Obtain other related information materials that have an impact on the work	i) what other information materials might be relevant



Unit AG 20 Design information materials for use in the service

Element 20.2 Obtain information for inclusion in the information materials

You must be able to:	You must know:
1. Determine the methods that should be used for obtaining the information	a) the different methods that can be used for obtaining different types of information
2. Access the relevant information sources using the appropriate procedures	b) what the procedures are for accessing information c) the difficulties that can occur when obtaining information
3. Confirm the validity of the information	d) how to decide whether the information obtained is valid
4. Obtain the information using the specified methods	e) why it is important to use the agreed methods of obtaining information
5. Protect the information sources according to agreed procedures	f) why it is important to protect the information sources
6. Identify any problems with obtaining the information	g) what types of problem could occur h) what actions can be taken to address them i) why it is important to address problems j) what the implications are of not addressing the problems
7. Record the information accurately in the appropriate systems	k) what the systems are for recording information and the procedures that relate to the use of these l) why it is important to use the systems



Unit AG 20 Design information materials for use in the service

Element 20.3 Design the format of the information materials

You must be able to:	You must know:
1. Identify the components of the information materials that will be used for delivering the content	<ul style="list-style-type: none"> a) what the components of the information materials are b) how the components of the information materials relate to each other c) the content that is being delivered in the information materials
2. Determine the structure of the information materials so that it effectively delivers the content	d) How to structure information materials
3. Select the most appropriate style to enhance the effectiveness of the information materials	<ul style="list-style-type: none"> e) which styles could be used in the information materials f) how styles have been used before in the information materials
4. Exchange information on the design of the information materials with the relevant people	g) who requires information on the designs of information materials
5. Ensure the design achieves the specified objectives of the information materials	h) what the objectives of the information materials are
6. Record information on the design in the appropriate systems	<ul style="list-style-type: none"> i) the systems for recording designs are and the procedures relating to the use of these j) why it is important to use the systems



Unit AG 20 Design information materials for use in the service

Element 20.4 Create text and graphics for the information materials

<i>You must be able to:</i>	<i>You must know:</i>
1. Obtain all relevant details that should be incorporated into the text or graphics	a) what details are included in text or graphics b) how to incorporate them into text or graphics
2. Produce text or graphics to effectively convey the required content	c) how to use text or graphics
3. Select a vocabulary that is suitable to the clients of the information materials	d) who the clients of the information materials are e) which different vocabularies are suitable for clients
4. Ensure the text or graphics is free from errors according to the agreed procedures	f) what types of error can occur in text or graphics
5. Produce text or graphics in the formats required in the information materials	g) which formats should be used in the information materials
6. Record information the text or graphics in the appropriate systems	h) what the systems are for recording text or graphics and the procedures relating to the use of these i) why it is important to use the systems



Unit AG 20 Design information materials for use in the service

Element 20.5 Edit the information materials

You must be able to:	You must know:
1. Identify any aspects of the information materials that require particular attention	a) which aspects of the information materials might require particular attention
2. Ensure all the components of the information materials are contained and placed in the correct position	b) how the different components of the information materials should relate to each other c) how the components of the information materials should be structured
3. Identify correctly any inconsistencies and inaccuracies	d) what types of inconsistencies and inaccuracies could occur in the information materials
4. Identify improvements to remove any inconsistencies and inaccuracies	e) what improvements could be made to the information materials
5. Identify any legislation, codes of practice, guidelines, and ethical requirements that are relevant to 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
6. Amend correctly any non-compliance with the relevant legislation, codes of practice, guidelines, and ethical requirements	j) why it is important to amend them
7. Record information on the edited information materials in the appropriate systems	k) what the systems are for recording amendments and the procedures relating to the use of these l) why it is important to use the systems



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:	You must know:
1. Review the information materials currently used by the service and its clients	<ul style="list-style-type: none"> 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
2. Assess how the information materials comply with relevant legislation, codes of practice, guidelines, and ethical requirements	<ul style="list-style-type: none"> 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
3. Identify clearly the way the information materials are used	<ul style="list-style-type: none"> j) how many people use the information materials
4. Consult with all relevant sources on the effectiveness of the information materials currently used	<ul style="list-style-type: none"> 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
5. Explore the future requirements for information materials	<ul style="list-style-type: none"> 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
6. Identify any trends or developments in the dissemination of information materials	<ul style="list-style-type: none"> 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 22 Promote the position of Careers Education Guidance (CEG) within the organisation

Element 22.1 Identify opportunities to promote CEG within the organisation

You must be able to:	You must know:
1. Confirm your understanding of the organisation's values, aims, policies and objectives	a) the values, aims, policies and objectives of your organisation
2. Establish a clear understanding of the current position of CEG within the organisation	b) the current position of CEG and how it fits within the organisation
3. Accurately identify points of coherence and disjunction between the organisation's values, aims, policies and objectives and the goals you see for CEG	c) how to assess the potential contribution of CEG to the values, aims, policies and objectives of the organisation
4. Identify what needs to be done to ensure that all interested parties are made aware of the potential contribution and value of CEG to the organisation	d) who the interested parties are e) how to assess the potential contribution and value of CEG to the organisation
5. Ensure that your strategy sets out clear, cost-effective and measurable objectives for the promotion of CEG within the organisation	f) how to develop a strategy, determining the objectives, activities and resources needed to achieve the strategic aims
6. Set a realistic schedule for the activities needed to achieve your strategy's objectives	g) how to assess a realistic schedule



<p>7. Ensure that your strategy includes an evaluation plan</p>	<p><i>h)</i> how to develop an evaluation plan</p>
<p>8. Include accurate costings for the resources needed to implement your strategy for consideration by senior management</p>	<p><i>i)</i> how to identify and calculate the costs of the resources needed</p>
<p>9. Communicate with interested parties in a way that ensures good working relationships are maintained</p>	<p><i>j)</i> the importance of maintaining good working relationships</p> <p><i>k)</i> the importance of communicating clearly</p> <p><i>l)</i> the roles and responsibilities of those within the organisation who can provide you with information</p>
<p>10. Amend your strategy as appropriate to take account of feedback from interested parties</p>	<p><i>m)</i> the roles and responsibilities of those within the organisation who can provide you with information</p>



Unit AG 22 Promote the position of Careers Education Guidance (CEG) within the organisation

Element 22.2 Gain support for the strategy

You must be able to:	You must know:
1. Present your strategy in a format which is clear and cohesive	a) how to communicate effectively with interested parties both orally and in writing b) how to develop and present a reasoned argument
2. Clearly set out the rationale for your strategy and detail its components	c) how to present information in both formal and informal settings
3. Make good use of opportunities arising to share your strategy with interested parties	d) the responsibilities of individuals within the organisation
4. Present your strategy to interested parties in a way which is likely to gain their commitment to the strategy	e) how to select an appropriate mode and time for the presentation of your strategy
5. Present your strategy to interested parties at times when discussion and decision-making will be possible	f) how to select an appropriate mode and time for the presentation of your strategy g) the responsibilities of individuals within the organisation
6. Conduct discussions in a manner which maintains good working relationships with interested parties 7. Provide sufficient relevant information to allow interested parties to make decisions 8. Respond fully and promptly to questions from interested parties	h) how to plan your approaches and communicate clearly using a variety of techniques in order to influence the behaviour and thinking of others



Unit AG 22 Promote the position of Careers Education Guidance (CEG) within the organisation

Element 22.3 Implement and evaluate a strategy to promote CEG within the organisation

You must be able to:	You must know:
1. Clearly explain procedures and timescales for implementing the strategy with those involved	a) organisational requirements for the implementation of new procedures
2. Confirm their understanding of, and commitment to, meeting the aims and objectives of the strategy	b) the roles and responsibilities of individuals within your organisation
3. Monitor activities against the aims and objectives of the strategy	c) how to monitor the profile of CEG within the organisation
4. Make effective use of different sources of information	d) the sources and types of information that reveal the profile of CEG within the organisation e) what the advantages and drawbacks are of feedback forms, surveys, discussion groups, and ad hoc approaches to gathering information about the effectiveness of the CEG service
5. Regularly review feedback on the CEG service from relevant groups	f) what sorts of feedback can be obtained from different groups
6. Assess the evidence available and make a valid judgement on the effectiveness of the strategy	g) how to make valid judgements based on the evidence available
7. Evaluate the strategy taking account of all relevant factors	h) the importance of monitoring and evaluation in the maintenance of the CEG service



<p>8. Provide accurate and clear information to keep interested parties informed about the continuing profile of CEG within the organisation</p> <p>9. Present information to interested parties in an appropriate manner and at an appropriate time</p>	<p>i) how to present relevant information in an appropriate format and at an appropriate time</p>
<p>10. Identify possible reasons and discuss these with interested parties, where performance fails to meet the agreed criteria</p> <p>11. Use the results of your evaluation to review and revise the strategy to promote the position of CEG within the organisation</p>	<p>j) the importance of monitoring and evaluation in the maintenance of the CEG service</p>



Unit AG 23 Identify the contribution of Careers Education Guidance (CEG) to the achievement of the organisation's values, aims and objectives

Element 23.1 Gather information on the scope of the CEG provision

You must be able to:	You must know:
1. Select the key factors to be researched in your evaluation of the CEG provision, based on the requirements of relevant regional and national criteria	a) what aspects of CEG may contribute to the achievement of the organisation's values, aims, and objectives
2. Get agreement from relevant decision-makers for the research to go ahead	b) how to develop and argue a case for resources/time from a colleague c) how to identify, justify and secure resources that will be required
3. Identify potential sources of information on the factors you are to assess	d) how to identify information requirements e) where information may be found
4. Identify cost-effective and reliable methods of gathering the information you require	f) what is involved in using different methods to gather information, including using surveys, examining records and holding meetings g) how to access and make use of preexisting information on the CEG provision eg. Evidence of compliance with relevant regional and national criteria
5. Collect information which is accurate, sufficient and relevant to the purpose for which it is needed	h) what information is relevant and how much of it is needed i) how to check the accuracy of the information
6. Maintain accurate records of the information gathered	j) how to collect record and store the required information



<p>7. Identify the resources needed to meet information requirements within agreed timescales</p>	<p><i>k)</i> how to identify the resources that will be required</p>
<p>8. Plan your research to ensure minimal disruption to the delivery of CEG</p>	<p><i>l)</i> how to minimise disruption to service delivery</p>
<p>9. Pursue alternative sources of information where the required information is not available</p>	<p><i>m)</i> how to overcome problems in gathering information</p>
<p>10. specify information requirements which are clear, accurate and understood by relevant people</p>	<p><i>n)</i> the importance of confirming colleagues' understanding of information requirements</p>
<p>11. communicate with relevant people in a way that ensures good working relationships are maintained</p>	<p><i>o)</i> the importance of maintaining good working relationships <i>p)</i> how to establish and maintain communication with contacts external to your organisation</p>



Unit AG 23 Identify the contribution of Careers Education Guidance (CEG) to the achievement of the organisation's values, aims and objectives

Element 23.2 Evaluate the contribution of CEG to the values, aims and objectives of the organisation

You must be able to:	You must know:
1. Have access to all information relevant to the evaluation of the contribution of CEG to the values, aims and objectives of the organisation	a) the values, aims and objectives of your organisation which may be contained in the development plan
2. Discuss potential conflicts between the values, aims and objectives of the organisation and the CEG provision with relevant people	b) how to assess the contribution of CEG to the values, aims and objectives of the organisation c) how to identify and reconcile potential differences between the organisation's values, aims and objectives and that of the CEG provision
3. Evaluate the information collected on the CEG provision against all the key factors being examined	d) regional and national criteria against which the CEG provision will be assessed e) different forms of evaluation
4. Draw valid and justified conclusions based on the information you have collected	f) how to judge whether a conclusion is valid or not g) how to develop and present a reasoned evaluation
5. Identify the additional information that would be needed where firm conclusions are not possible from the evidence collected	h) how to identify information requirements
6. Present your evaluation clearly and in the required format	i) the format and presentation of reports expected by your organisation
7. Report to the relevant people where information is not available to carry out the evaluation	j) the relevant people to whom you should report problems in carrying out the evaluation



<p>8. Communicate with relevant people in a way that ensures good working relationships are maintained</p>	<p><i>k)</i> the importance of maintaining good working relationships <i>l)</i> the importance of communicating clearly</p>
<p>9. Make clear recommendations on the scale and frequency of future evaluations that should be conducted, to allow the organisation to maintain an up to date view of the contribution of CEG to its values, aims and objectives</p>	<p><i>m)</i> how to develop and present recommendations</p>



Unit AG 24 Integrate Careers Education Guidance (CEG) within the curriculum

Element 24.1 Identify opportunities to integrate CEG within the curriculum

You must be able to:	You must know:
1. select relevant people within the organisation to assist you in the identification of potential opportunities to integrate CEG within the curriculum	a) the roles and responsibilities of individuals within the organisation
2. confirm that the relevant people understand and are committed to integration and their role in the identification of potential opportunities	b) the importance of confirming colleagues' understanding of their roles and responsibilities
3. identify and prioritise potential opportunities in discussion with the relevant people	c) how to assess the information and views of all relevant people and identify and prioritise the opportunities
4. consult the relevant people at an appropriate time and place and in a manner that encourages their co-operation 5. pursue alternative methods of gaining support where it is not readily available	d) the importance of effective communication in maintaining good working relationships
6. agree the nature and level of integration that could be achieved with the relevant people 7. confirm that the aims and objectives of the selected opportunities are consistent with the values, policies, aims and objectives of the organisation	e) the values, policies, aims and objectives of the organisation



Unit AG 24 Integrate Careers Education Guidance (CEG) within the curriculum

Element 24.2 Plan and implement the integration of CEG within the curriculum

You must be able to:	You must know:
<ol style="list-style-type: none"> 1. Provide a clear specification of CEG goals in relation to curriculum planning 2. Provide information, advice and guidance to others on the resources available for the integration of CEG within the curriculum framework 	<ol style="list-style-type: none"> a) the values, policies, aims and objectives of the organisation
<ol style="list-style-type: none"> 3. Help others to ensure that their teaching plans make effective use of opportunities to incorporate CEG objectives at course and lesson level 4. Take effective action to secure the resources required to integrate CEG within the curriculum 5. Pursue alternative sources of resources as required 	<ol style="list-style-type: none"> b) the importance of confirming colleagues' understanding of their roles and responsibilities c) the roles and responsibilities of relevant people within the organisation d) how to identify and secure the resources required e) how to manage the use of resources
<ol style="list-style-type: none"> 6. Communicate with relevant people in a way which promotes good working relationships 	<ol style="list-style-type: none"> f) the importance of maintaining good working relationships
<ol style="list-style-type: none"> 7. Keep relevant people informed of progress in planning and implementing the integration of CEG within the curriculum 	<ol style="list-style-type: none"> g) how to plan for integration with minimal disruption to service delivery



Unit AG 24 Integrate Careers Education Guidance (CEG) within the curriculum

Element 24.3 Monitor and maintain the integration of CEG within the curriculum

You must be able to:	You must know:
1. Implement effective procedures to monitor the integration of CEG within the curriculum	a) the policies and procedures of the organisation
2. Confirm that all relevant people understand, and are committed to, meeting monitoring requirements	b) how to confirm that others understand the information you have provided
3. Obtain feedback from relevant people on the integration of CEG within the curriculum	c) how to confirm your understanding of feedback from others
4. Use the information obtained to make valid judgements about the effectiveness of integration	d) the importance of monitoring the integration of CEG
5. Take appropriate action to maintain and develop the integration of CEG within the curriculum	e) the importance of acting promptly to ensure the maintenance of CEG
6. Communicate with relevant people in a way which ensures their continuing support	f) the importance of maintaining good working relationships with others



Unit AG 25 Promote Careers Education Guidance (CEG) within the community

Element 25.1 Plan the promotion of CEG

You must be able to:	You must know:
<ol style="list-style-type: none"> 1. Select methods of promotion suitable for the target group 2. Schedule the promotional activity for maximum effectiveness on the target group, taking account of other events in the same time span 	<ol style="list-style-type: none"> a) the range of promotional activities that could be used and the benefits and limitations of each for different target groups
<ol style="list-style-type: none"> 3. Review the outcomes of previous promotional activities when drawing up your plans 	<ol style="list-style-type: none"> b) how to make use of the experiences and outcomes of prior activities to improve future plans
<ol style="list-style-type: none"> 4. Identify the most appropriate information to disseminate to the target group through the planned activity 	<ol style="list-style-type: none"> c) the needs and interests of different target groups
<ol style="list-style-type: none"> 5. Select a format and presentational style for the information to be given out that is suited to the needs of the target group 	<ol style="list-style-type: none"> d) how to present information in an appropriate style and at an appropriate time
<ol style="list-style-type: none"> 6. Negotiate the support of interested parties for the planned promotional activity 	<ol style="list-style-type: none"> e) the roles and responsibilities of interested parties both within and external to your organisation f) how to plan the efficient use of time and other resources
<ol style="list-style-type: none"> 7. Secure the resources required to implement the planned promotional activity 	<ol style="list-style-type: none"> g) how to identify resources that will be required h) how to develop and argue a case for resources i) how to plan the efficient use of time and other resources



<p>8. Raise awareness of the planned promotional activity within the target group</p>	<p><i>j)</i> how to communicate in a way that gains support</p>
<p>9. Make your plans known to all interested parties and invite feedback from them to help you improve the plans</p>	<p><i>k)</i> how to establish and maintain networks</p>
<p>10. Set out and record your plans clearly</p>	<p><i>l)</i> how to plan the efficient use of time and other resources</p>
<p>11. Ensure that plans are disseminated in good time to all those involved in implementing them</p>	<p><i>m)</i> how to present information in an appropriate style and at an appropriate time</p>
<p>12. Specify how the promotional activity will be evaluated</p>	<p><i>n)</i> how to identify and collect relevant information</p>



Unit AG 26 Negotiate and maintain service agreements

Element 26.1 Negotiate service provision with other parties

You must be able to:	You must know:
1. Identify appropriate other parties on the basis of service policy	<ul style="list-style-type: none"> a) appropriate other parties with whom agreements have to be reached b) your own organisation's and other party's aims, policies, resources and procedures for service delivery to end users
2. Ensure that both parties provide accurate and complete information	<ul style="list-style-type: none"> c) roles and responsibilities of each party to the service agreement
3. Conduct negotiations within the agreed requirements of the provider and receiving organisation contract	<ul style="list-style-type: none"> d) ways to introduce, promote and negotiate service agreements with other parties e) methods of liaising with other parties during negotiation of service agreements
4. Explore service options and select the preferred option	<ul style="list-style-type: none"> f) your organisation's aims, constraints and procedures for service delivery
5. Reach a workable service agreement and obtain and record necessary approvals and endorsements	<ul style="list-style-type: none"> g) relevant legislation h) ethical codes of practice and principles underpinning practice i) equal opportunities legislation and good practice j) equality of opportunity and non-discriminatory practice with regard to service agreements k) your organisation's equal opportunities policy and code of practice



Unit AG 26 Negotiate and maintain service agreements

Element 26.2 Monitor and evaluate service agreements with other parties

You must be able to:	You must know:
1. Monitor and evaluate service agreements to ensure their effectiveness	<ul style="list-style-type: none"> a) nature of the service provided by the recipient of the service to the end user clients b) your organisation's equal opportunities policy and code of practice c) methods of monitoring and evaluating the effectiveness of service agreements d) methods of analysing information e) roles and responsibilities of each party in the delivery of the service
2. Provide and seek feedback on the effectiveness of service agreements from other parties	<ul style="list-style-type: none"> f) purpose, scope, methods and types of feedback g) roles and responsibilities with regard to giving and obtaining feedback
3. Identify problems relating to a service agreement and raise them with other parties	<ul style="list-style-type: none"> h) methods of liaising with other parties during service agreements
4. Identify and agree support needs and methods of meeting them with other parties	<ul style="list-style-type: none"> i) methods of identifying support needs
5. Re-negotiate service agreements in order to ensure the effectiveness of service to end users	<ul style="list-style-type: none"> j) ethical codes of practice and principles underpinning practice k) equal opportunities legislation and good practice l) equality of opportunity and non-discriminatory practice with regard to service agreements



Unit AG 27 Facilitate learning in groups

Element 27.1 Manage group dynamics

You must be able to:	You must know:
9. Maintain learning within the group through the use of facilitating, managing and intervening skills	n) how to identify facilitation and intervening skills are and when to use them
10. Establish a balance between the tasks to be accomplished and the group process	o) how to balance the needs of tasks and group processes p) how learning and group processes impact on each other
11. Encourage group members to participate effectively and ensure that they feel comfortable	q) how to put learners at ease r) how to interpret non-verbal communication s) how to address individual needs in a group setting
12. Establish and maintain an appropriate manner, level and pace of communication with for group members	t) what factors are likely to affect learning and behaviour in groups u) how to address individual needs in a group setting
13. Constructively challenge any stereotyping of individual roles and behaviours in the group	v) what the key theoretical models of group work are w) how to form and maintain close groups
14. Appropriately challenge any excluding or discriminatory behaviour or language	x) what the issues of equality and of opportunity and non-discriminatory practice in relation to group work are
15. Enhance learning through the constructive use of power, authority and influence 16. Deal with conflict within the group in a way which maintains the ability of group members	y) 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:	You must know:
8. Agree the purpose, process and intended outcome of group activity with the group	<ul style="list-style-type: none"> a) how to balance the needs of tasks and group processes b) how learning and group processes impact on each other
<ul style="list-style-type: none"> 9. Adapt group activities to the size and composition of the group 10. Manage the timing and pace of group activities effectively 	<ul style="list-style-type: none"> c) what different learning activities are available d) how to sequence and pace information and gauge appropriateness of language for individual learners
11. Use adaptations and interventions effectively to improve the learning process	<ul style="list-style-type: none"> e) how to identify facilitation and intervening skills are and when to use them
12. Explore with the group any factors which contribute to the ability to learn of the individual members	<ul style="list-style-type: none"> f) what different learning styles there are g) how to put groups at ease
13. Encourage group members to reflect on the way in which they have been learning and participating in the group	<ul style="list-style-type: none"> h) what the methods of eliciting personal views are and how to use these
<ul style="list-style-type: none"> 14. Monitor the progress of individual group members in a sensitive manner 15. Give timely feedback on progress made and the process of learning to the group and to individual members in a positive and encouraging manner 	<ul style="list-style-type: none"> i) how to monitor learner's progress in a group setting j) what resources and support are available for learners
16. Manage group dynamics effectively	<ul style="list-style-type: none"> k) what the key theoretical models of group work are



Unit AG28 Prepare and Set up Mediation

Element 28.1 Establish the appropriateness of the mediation process with each party

You must be able to:	You must know:
1. Clearly explain the purpose of the mediation process, at a pace and using language which is appropriate to the parties	a) The principles of mediation which include: the voluntary nature of participation; impartiality and independence of the mediator; freedom from coercion; the nature of confidentiality of exchanges throughout the process and the role of privileged information.
2. Explain the principles of mediation and apply them throughout the process	b) How to check parties' understanding from time to time, and help them to fully understand the information you are giving them.
3. Explain the potential and limitations of mediation, realistically and objectively	c) How to clarify information which may include rephrasing some of the information.
4. Check each party's understanding and where necessary clarify information.	d) How to establish commitment from the parties and what this is likely to involve including encouraging parties' informed decisions and autonomy and reviewing other options.
5. Treat parties in an impartial and non-directive manner which promotes co-operation and the positive use of mediation	e) Alternative options including referral to other agencies or other mediators.
6. Encourage parties to ask questions and seek clarification in order to help them to decide on the appropriateness of mediation for their situation	
7. Invite parties to express their feelings and concerns about the mediation process	
8. Establish each party's commitment to the mediation process	
9. Consider alternative options in situations where mediation or you as the mediator are inappropriate	



Unit AG 28 Prepare and Set up Mediation

Element 28.2 Agree the conditions and boundaries of mediation with parties

You must be able to:	You must know:
1. Identify and devise strategies to bring parties in dispute to the mediation process	a) The likely conditions of the mediation process including the number and lengths of sessions; mediation model adopted; options for the degree of mediator involvement in the process; complaints procedure; voluntary participation.
2. Agree and obtain parties' informed consent to the proposed mediation model and conditions	b) How to consider the appropriateness of the location and venue taking into account the location and size of rooms; arrangement of furniture; physical comfort; neutrality of the venue; safety; practicality; accessibility
3. Establish the principle of balanced participation of both parties and agree methods of ensuring this balance is maintained throughout the process	
4. Establish the nature and appropriateness of issues for mediation	
5. Explain and clarify your role and how impartiality will be maintained	
6. Explain how mediation relates to the legal position of each party	
7. Ensure, as far as you are able, that the location and venue for mediation are appropriate	



Unit AG29 Stage the Mediation Process

Element 29.1 Establish the issues for each party

You must be able to:	You must know:
<ol style="list-style-type: none"> 1. Allow each party sufficient uninterrupted time to express their feelings and concerns 2. Check and confirm with each party that information obtained is accurate 3. Identify issues and agree with parties which ones will form the agenda for discussion 4. Discuss issues in an order that gives the maximum chance for progress to be made 5. Consider alternative options where the concerns of the parties cannot be met through mediation or you as the mediator 	<ol style="list-style-type: none"> a) What the range of interventions are which you may have to use in facilitating parties to express their concerns and issues, including open and focused questioning; clarifying; summarising; checking assumptions; challenging in a constructive way; active listening; rephrasing; encouraging parties to be assertive b) What alternative options might be applicable including referral to other agencies or other mediators



Unit AG 29 Stage the Mediation Process

Element 29.2 Explore issues with the parties

You must be able to:

1. Facilitate the gathering and exchanging of information between parties
2. Respect and manage differences of position
3. Facilitate and manage the demonstration of emotions and feelings, to allow the mediation process to move forward
4. Encourage parties to acknowledge each other's perspective
5. Establish common ground where agreement is possible
6. Clarify and respect issues of confidentiality

You must know:

- a) The range of interventions you may need to use in facilitating the gathering and exchange of information including open and focused questioning; summarising; checking assumptions; challenging in a constructive way; active listening; rephrasing; encouraging parties to be assertive
- b) The range of interventions you may need to use in facilitating and managing the expression of emotions and feelings including responding to body language; acknowledging the feelings and needs of the individual and the different ways in which they might manifest them



Unit AG 29 Stage the Mediation Process

Element 29.3 Assist in the identification and evaluation of potential options

You must be able to:	You must know:
<ol style="list-style-type: none"> 1. Ensure that the timing for exploring options and proposals is appropriate to the progress made in the mediation process 2. Reassure parties about confidentiality and the safety and security of discussing options 3. Help parties to create and develop potential options 4. Focus discussions primarily on future possibilities rather than on past events 5. Ensure that parties consider as full a range of options as possible 6. Facilitate parties in exploring and evaluating the implications, consequences and practicalities of the options 7. Help to develop further options, where progress cannot be made 	<ol style="list-style-type: none"> a) The range of interventions you may need to use in facilitating parties to explore and evaluate options including redefining issues in a mutual rather than exclusive way; showing understanding of constituent needs and interests; focusing on important issues; encouraging development of autonomy and ownership of outcomes; encouraging parties; respecting the roles of individuals; identifying key words and phrases which indicate potential for movement and change.



Unit AG 29 Stage the Mediation Process

Element 29.4 Build and secure agreements between parties

You must be able to:	You must know:
<ol style="list-style-type: none"> 1. Ensure that any agreement is the result of a joint decision between parties 2. Agree the criteria for the agreement with the parties 3. Get responses to the options being discussed from the parties 4. Get alternative suggestions where necessary 5. Suggest ways in which gaps between the position of each party can be narrowed 6. Identify and build on moments when decisions on options can be made 7. Identify and build on potential for compromise between the parties 8. Check the basis of an agreement with the parties in order to ensure ownership 9. Agree the conditions and method of implementing the agreement with the parties 10. Record agreements in a suitable form 	<ol style="list-style-type: none"> a) The range of interventions you may need to use in building and securing agreements including identifying key words and phrases which indicate the potential for movement and change; showing understanding of constituent needs; respecting the roles of individuals; focusing on important issues; focusing on autonomy and ownership of outcomes; checking parties' understanding of agreements; emphasising the benefits of reaching an agreement and the continuing problems if no agreement is reached. b) What the criteria for agreements are likely to include such as outcomes which meet the needs of both parties; freedom from coerced outcome; willingness to implement agreed outcomes; practicality of outcomes and likelihood of implementation; resolution of issues rather than their avoidance or partial resolution. c) What potential compromises could involve new creative solutions (e.g. new options). d) The conditions and method of implementing the agreement which must include the responsibilities of each party.



Unit AG 30 Manage the process of Mediation

Element 30.1 Facilitate exchanges between parties

You must be able to:	You must know:
<ol style="list-style-type: none"> 1. Allow each party sufficient uninterrupted time, to put forward information 2. Regularly check and act on each party's understanding of the issues 3. Ensure that information exchanged is accurate and comprehensive 4. Maintain a flow of information between parties and encourage, where appropriate, direct communication between them 5. Maintain the confidential aspects of each party's position throughout the exchange 6. Consider different ways of mediating as a means of facilitating progress 7. Ensure equal involvement of the parties throughout the process 8. Respect and use the competence of the parties throughout the process 9. Apply the agreed ground rules fairly and consistently throughout the process 10. Adjust the content and style of communication between parties to facilitate constructive exchanges 11. Ensure that the voluntary nature of participation is maintained throughout the process 	<ol style="list-style-type: none"> a) The range of interventions you may have to use in facilitating exchanges between parties including separating people from problems; redefining problems in a mutual rather than exclusive way; establishing interests rather than positions; challenging destructive statements; focusing on impartial issues; managing interruptions; breaking up global statements into constituent issues; encouraging conciliatory gestures of acknowledgement of other's position; asking 'what if' and 'devil's advocate' questions; recognising stages in the process and adapting interventions; clarifying information; checking that parties hear each other. b) How to accurately summarise, rephrase and redefine issues in ways which ensure the party's understanding and satisfaction c) Different ways of mediating which could include different types of meetings and methods of mediation. d) Ground rules for mediation including respecting interests of third parties; not speaking for the other person or interrupting; respecting roles of individuals; understanding needs of all constituents in the process; parties' ownership of the outcomes; listening to others; acknowledging the reasons for other party's behaviour; encouraging individuals to say what they feel; e) confidentiality and impartiality of the process; voluntary nature of the process; freedom from physical or mental bullying; freedom from blame.



Unit AG 30 Manage the process of Mediation

Element 30.2 Manage conflict and address power imbalances

You must be able to:

1. Recognise and draw attention to any power imbalances within the mediation process
2. Identify alternative options for the parties, where power imbalances hinder the mediation process
3. Use a range of interventions to limit the adverse effect of strongly expressed negative feelings and emotions
4. Manage aggression by the parties in order to sustain the mediation process
5. Ensure that each party has equal opportunity to participate

You must know:

- a) How to manage conflict in order to acknowledge power imbalances; neutralise or reduce the power imbalances; limit the affect of strongly expressed negative feelings and emotions; reduce or diffuse tensions.
- b) What power imbalances are likely to include such as the parties' negotiating capacity, personal vulnerability, economic and social circumstances, and how to address them.
- c) How to encourage parties to recognise differences in the way they approach and manage conflict so that aggression by the parties can be managed.