

**Learner Unit Achievement Checklist**

**BIIAB Level 4 Diploma in Advice and Guidance (NVQ)**

**601/7408/0**

###### BIIAB Level 4 Diploma in Advice and Guidance (NVQ)

## Centre Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Learner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**M/602/5182 Negotiate on behalf of advice and guidance clients**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Explain the types of negotiation strategies suitable for different types of issue  **1.2** Explain what different formats of negotiation can be used  **1.3** Explain what supporting documentation might be required |  |  |  |  |
| **2.1** Review the client’s requirements  **2.2** Identify a negotiation strategy suitable for the client’s requirements  **2.3** Prepare suitable offers for clients that meet their requirements |  |  |  |  |
| **3.1** Receive offers from other parties  **3.2** Consult with the clients to assess how far the offers meet requirements  **3.3** Recommend the next stage in the negotiations |  |  |  |  |
| **4.1** Produce agreements that effectively meet the client’s requirements and that are in the required format.  **4.2** Incorporate all necessary details into the agreement and ensure it is capable of being implemented  **4.3** Confirm agreements with clients at appropriate stages of the negotiations  **4.4** Advise the clients why any requirements cannot be met or if there are any significant changes to the agreement. |  |  |  |  |

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**T/602/5183 Liaise with other services**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Explain which other services are likely to be dealt with  **1.2** Explain the types of information likely to be exchanged  **1.3** Explain why it is important to check the validity of any information received  **1.4** Explain who is involved in different types of information exchanges and who should receive copies of the information  **1.5** Explain the types of problems that may arise and what actions can be taken to resolve them |  |  |  |  |
| **2.1** Consult with other services on the information requirements of each service  **2.2** Agree the purpose scope and procedures for exchanging information  **2.3** Ensure that documented procedures, that include identifying the roles and responsibilities of those involved in any exchange of information, are produced  **2.4** Disseminate procedures for the exchange of information with other services  **2.5** Agree a process to regularly review and update the procedures |  |  |  |  |
| **3.1** Confirm the information required by other services  **3.2** Select the appropriate information and disseminate using agreed procedures.  **3.3** Assist other services to interpret the information forwarded  **3.4** Confirm that the information is sufficient, forwarding additional information if required |  |  |  |  |
| **4.1** Request required information from other services using the agreed procedures  **4.2** Access the relevant information and confirm the validity of it  **4.3** Identify any problems with obtaining information |  |  |  |  |

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**F/602/5185 Enable advice and guidance clients to access referral opportunities**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Explain which organisations clients are likely to be referred to  **1.2** Explain what types of information the client will need including the various formats this may need to be in |  |  |  |  |
| **2.1** Obtain information from clients on their requirements  **2.2** Obtain relevant, and current information on other services that are potentially suitable  **2.3** Assess the suitability of other services  **2.4** Confirm the other service’s acceptance criteria and procedures  **2.5** Ensure the other services have the capacity and resources to deal with additional clients  **2.6** Review the requirements of the clients and check them against the services provided by the other services |  |  |  |  |
| **3.1** Provide information, including advantages and disadvantages of referral, to enable clients to make an informed decision  **3.2** Confirm the acceptability of the referral with the client  **3.3** Plan the implementation of the referral  **3.4** Facilitate the client’s contact with the other services  **3.5** Review the boundaries of confidentiality with the client informing them of the information that has to be passed between the services  **3.6** Agree any further information or support that is required by the client |  |  |  |  |

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**Y/602/5189 Manage personal case load - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Record key information about each case  **1.2** Record all actions being undertaken for clients  **1.3** Ensure case notes are accurate and contain appropriate detail  **1.4** Ensure case notes are structured in a way that gives a clear history |  |  |  |  |
| **2.1** Review all relevant information  **2.2** Monitor the progress of all cases  **2.3** Identify any obstacles in achieving the required outcomes for cases  **2.4** Exchange information on the cases according to the service’s procedures  **2.5** Identify improvements that can be made to the management of cases |  |  |  |  |
| **3.1** Explain what types of obstacle may occur and how to overcome it  **3.2** Explain any factors that may affect the number of cases managed |  |  |  |  |
| **4.1** Establish criteria for setting priorities  **4.2** Assess cases against the criteria to show which cases need high priority  **4.3** Identify any immediate actions that may be required to meet deadlines  **4.4** Inform relevant people of the need to prioritise specific cases  **4.5** Ensure appropriate resources are allocated to the cases  **4.6** Monitor the effect of the priority cases on the rest of the caseload  **4.7** Ensure all cases receive appropriate attention |  |  |  |  |

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**H/602/5194 Evaluate and develop own contribution to the service - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Identify criteria used to evaluate practice  **1.2** Evaluate practice including identifying areas for development  **1.3** Identify the information to be evaluated  **1.4** Agree the feedback to be accessed  **1.5** Identify the objectives of the service which will inform evaluation |  |  |  |  |
| **2.1** Evaluate information using identified criteria  **2.2** Implement agreed criteria to evaluate practice  **2.3** Evaluate the effect of own values, beliefs, attitudes and behaviours on work role  **2.4** Identify aspects of knowledge required by the service and the profession  **2.5** Seek guidance and support when issues are beyond own knowledge and experience |  |  |  |  |
| **3.1** Use outcomes of evaluation to prioritise and agree development objectives  **3.2** Identify and access the necessary resources for development  **3.3** Record personal development plans  **3.4** Review and update personal development plans |  |  |  |  |

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**F/602/5199 Operate within networks - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Determine the role and purpose of existing networks  **1.2** Implement the service’s criteria for network participation  **1.3** Agree with practitioners how much time should be given to networks  **1.4** Explain the types of conflicts which could occur |  |  |  |  |
| **2.1** Maintain personal contacts within networks  **2.2** Identify problems which may occur with network facilitation and participation  **2.3** Explain the actions to take to address problems identified within networks  **2.4** Explain what the implications could be if problems are not resolved |  |  |  |  |
| **3.1** Agree the information required by network members  **3.2** Work to realistic timescales for the exchange of information  **3.3** Analyse how feedback improves the use of networks  **3.4** Utilise systems for recording and exchanging information |  |  |  |  |

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**T/602/5202 Provide and maintain information materials for use in the service**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Use service’s criteria for evaluating the sources of information  **1.2** Identify the information currently used by different areas and clients of the service  **1.3** Evaluate the format the information materials are in  **1.4** Agree the future needs of the organisation in relation to information provision |  |  |  |  |
| **2.1** Evaluate the types of trends or developments which might occur when providing information  **2.2** Assess the impact of information and communication technologies on the provision of information  **2.3** Specify the information to be obtained and distributed  **2.4** Store information according to the service’s policies and procedures |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**A/602/5203 Identify and promote the contribution of Careers Education Guidance \_CEG\_ within the organisation**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Identify the regional and national criteria against which CEG provision will be assessed  **1.2** Present a rationale for CEG in formal and informal settings  **1.3** Communicate, orally and in writing, the strategy to interested parties  **1.4** Conduct discussions in a way which maintains good working relationships with interested parties |  |  |  |  |
| **2.1** Establish the values, aims, policies and procedures of the organisation  **2.2** Explain the current role of CEG within the organisation  **2.3** Assess the potential contribution of CEG to the organisation  **2.4** Identify the roles and responsibilities of those who can provide information within the organisation |  |  |  |  |
| **3.1** Develop a strategy to determine the objectives, activities and resources required to achieve strategic aims  **3.2** Confirm the organisational roles, responsibilities and requirements for implementing the strategy  **3.3** Evaluate the advantages and drawbacks of: Feedback forms Surveys Discussion groups Ad hoc approaches to gathering information about CEG service  **3.4** Access relevant sources of information and feedback on the effectiveness of the strategy  **3.5** Monitor and evaluate the profile of CEG within the organisation  **3.6** Present relevant evaluation and revisions in an appropriate format and at an appropriate time |  |  |  |  |

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**J/602/5205 Promote Careers Education Guidance \_CEG\_**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Review the outcomes of previous promotional activities to inform current plans  **1.2** Evaluate the range of promotional activities that could be used, including the benefits and limitations of each for different target groups  **1.3** Plan the promotional activity for CEG including: consideration of effectiveness for target group taking account of other events within the same time span |  |  |  |  |
| **2.1** Establish the information needs of interested parties both within and external to the organisation  **2.2** Present information in an appropriate style and at an appropriate time |  |  |  |  |
| **3.1** Identify the resources that will be required  **3.2** Present a case for securing the necessary resources  **3.3** Plan the efficient use of time and other resources |  |  |  |  |

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**R/602/5207 Facilitate learning in groups**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Summarise the key theoretical models of group work  **1.2** Use facilitation and intervening skills in group situations  **1.3** Analyse how to balance the needs of tasks and group processes  **1.4** Encourage group members to participate effectively and ensure that they feel comfortable |  |  |  |  |
| **2.1** Use appropriate methods of communication  **2.2** Put learners at ease  **2.3** Establish what factors are likely to affect learning and behaviour in groups  **2.4** Identify how to address individual needs in a group setting  **2.5** Recognise and deal with issues of power, conflict and authority in groups |  |  |  |  |
| **3.1** Agree with the group, the purpose, process and intended outcomes of group activity  **3.2** Summarise the different learning styles  **3.3** Evaluate the range of learning activities available  **3.4** Access relevant resources and support for learners  **3.5** Adapt group activities to the size and composition of the group |  |  |  |  |
| **4.1** Agree and implement appropriate methods of eliciting personal views on learning  **4.2** Monitor individual learner’s progress in a group setting  **4.3** Feed back on progress made and process of learning to the group and to individual members in a positive and encouraging manner |  |  |  |  |

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**L/602/5139 Support clients to make use of the advice and guidance service**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Encourage clients to clarify their requirements and circumstances  **1.2** Assist clients to decide whether the service can meet their requirements, including: Identifying the appropriate information providing clients with information on the advantages and disadvantages of using the service |  |  |  |  |
| **2.1** Explore with clients the reasons for their information needs and agree how it will be provided  **2.2** Identify the most appropriate information sources and retrieve the relevant information  **2.3** Check the clients understanding of the information and confirm that the information provided is sufficient for their requirements  **2.4** Agree with the client any further activities necessary, including referral to alternative sources of information |  |  |  |  |
| **3.1** Explain what other suitable services are available  **3.2** Explain what is offered by these other services |  |  |  |  |
| **4.1** Provide information on other services that may be more suitable for meeting the clients requirements  **4.2** Advise the client on the approach to other services |  |  |  |  |
| **5.1** Clarify and confirm the clients’ requirements and how these will be met by the service  **5.2** Agree the way in which services can be provided  **5.3** Advise the client of the procedures for contacting and using the service |  |  |  |  |

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**R/602/5174 Advocate on behalf of advice and guidance clients**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Review relevant information on the requirements of the client  **1.2** Clarify with the client any additional information that may be required  **1.3** Confirm who should be contacted to pursue the interests of the client |  |  |  |  |
| **2.1** Identify the key aspects of client’s requirements that will feature in the discussions and debates  **2.2** Advise the client of how decisions are agreed between parties  **2.3** Advise the client what the results of previous similar advocacy have been |  |  |  |  |
| **3.1** Explain which services or people are usually contacted and who represents the service or people  **3.2** Explain what information should be included and how it should be presented |  |  |  |  |
| **4.1** Ensure all relevant people, documentation and associated materials are available for the presentation  **4.2** Provide information to all the relevant people according to agreed timescales  **4.3** Ensure oral and written presentations are clear and effective |  |  |  |  |
| **5.1** Present clients’ interests in a way that emphasises the key aspects  **5.2** Identify any errors or contradictions in the information relating to clients  **5.3** Identify any issues presented by others and offer constructive suggestions for their resolution |  |  |  |  |

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**H/602/5177 Prepare to represent advice and guidance clients in formal proceedings**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Explain to clients the roles and responsibilities of those involved in the proceedings  **1.2** Explain to the clients the potential advantages and disadvantages of the proceedings  **1.3** Explain to the clients the stages, timescales and cost implications of the proceedings  **1.4** Explain to clients both the types of information and the nature of the arguments that will be used during the proceedings  **1.5** Confirm the clients understanding and secure their formal agreement for representation to begin |  |  |  |  |
| **2.1** Confirm the parties involved in the case  **2.2** Obtain information on the case, obtaining any additional information that may be required  **2.3** Ensure information is disclosed according to established procedures  **2.4** Identify any aspects of the case that may lead to a reconsideration of its outcomes  **2.5** Confirm where the case will be heard and the parties involved |  |  |  |  |
| **3.1** Identify the key aspects of the case  **3.2** Prepare a strategy for arguing the case  **3.3** Identify the approach to advocacy that is likely to be successful  **3.4** Identify the line of questioning that will be put to the parties involved and the potential responses to the questions |  |  |  |  |

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**M/602/5179 Present cases for advice and guidance clients in formal proceedings**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Explain the types of problems that could occur with formal proceedings  **1.2** Explain actions that can be taken to address the problems |  |  |  |  |
| **2.1** Ensure all relevant people, documentation and associated materials are available for the case  **2.2** Present the case clearly and effectively  **2.3** Identify any errors or contradictions in the information relating to clients  **2.4** Effectively counter the arguments of opposing parties |  |  |  |  |
| **3.1** Review the outcomes of the proceedings with the clients  **3.2** Clarify to the client the responses of the other parties in relation to outcomes of the proceedings  **3.3** Specify the consequences of the outcomes to the clients and others  **3.4** Identify which objectives have been met and which have not  **3.5** Identify the potential for continuing the advocacy process and the requirements for any further action |  |  |  |  |

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**A/602/5198 Provide support for other practitioners**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Identify which practitioners need support  **1.2** Agree the purpose and objectives for the support required  **1.3** Agree the procedures for the recording and exchange of information  **1.4** Agree boundaries of confidentiality  **1.5** Determine when and how to review the support agreement |  |  |  |  |
| **2.1** Identify organisational expectations of practitioners  **2.2** Support practitioners to identify the limits of their competence  **2.3** Intervene in a timely way to maintain practitioner’s effectiveness and resolve tensions which may exist  **2.4** Provide constructive feedback on other’s practice |  |  |  |  |
| **3.1** Agree the issues which should be covered in the sessions  **3.2** Enable practitioners to reflect on their practice  **3.3** Identify and agree options for practitioners’ specific requirements  **3.4** Review support sessions and record the outcomes |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**K/602/5200 Undertake research for the service and its clients**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Identify the types of information required  **1.2** Evaluate potential sources of information  **1.3** Access information following the appropriate procedures  **1.4** Address any related risks or problems with the collection of information |  |  |  |  |
| **2.1** Apply organisational collection principles correctly and consistently  **2.2** Address any problems which occur when collecting information  **2.3** Record the collected information using appropriate systems |  |  |  |  |
| **3.1** Identify the appropriate methods of analysis  **3.2** Use the appropriate methods of analysis  **3.3** Present a rationale for any unexpected results  **3.4** Access systems for recording analysis results using agreed procedures  **3.5** Present research results in a suitable format, using acknowledgements appropriately |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**M/602/5201 Design information materials for use in the service**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Agree the particular requirements of different clients  **1.2** Respond to different needs when clients’ requirements differ from each other  **1.3** Identify how the information materials will be used throughout their life cycle  **1.4** Evaluate the success of the information materials |  |  |  |  |
| **2.1** Identity sources of required information  **2.2** Determine methods that can be used for obtaining and validating information  **2.3** Access information using agreed methods and procedures  **2.4** Address any problems identified with the collection of information  **2.5** Record the information accurately in the appropriate systems |  |  |  |  |
| **3.1** Determine the style and structure of the information materials to effectively deliver the contents  **3.2** Agree and produce the text and graphics components of the information materials  **3.3** Exchange information on the design with relevant people  **3.4** Record and store information on the design in the appropriate system |  |  |  |  |
| **4.1** Identify aspects of the information which require amending  **4.2** Correct any errors, inconsistencies or inaccuracies  **4.3** Record amendments made in the appropriate system |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**F/602/5204 Integrate Careers Education Guidance \_CEG\_ within the curriculum**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Establish the values, policies, aims and objectives of the organisation  **1.2** Confirm the roles and responsibilities of those who can assist in the integration of CEG  **1.3** Prioritise potential opportunities in consultation with relevant people  **1.4** Agree the nature and level of integration that could be achieved |  |  |  |  |
| **2.1** Communicate with relevant people in a way which promotes good working relationships  **2.2** Provide a clear specification of CEG goals in relation to curriculum planning  **2.3** Provide information, advice and guidance to others on the resources available for the integration of CEG  **2.4** Enable others to ensure that their teaching plans make effective use of opportunities to incorporate CEG objectives at course and lesson level |  |  |  |  |
| **3.1** Establish and use procedures to monitor the integration of CEG  **3.2** Gather feedback from relevant people on the integration of CEG  **3.3** Review the information obtained to make valid judgements about the effectiveness of integration  **3.4** Communicate with relevant people in a way which ensures their continuing support |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**L/602/5206 Negotiate and maintain service agreements**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Identify appropriate other parties with whom agreements have to be reached  **1.2** Establish the organisation’s and other party’s aims, policies, resources and procedures for service delivery to end users  **1.3** Introduce, promote and negotiate service agreements with other parties |  |  |  |  |
| **2.1** Agree roles and responsibilities of each party in relation to the service agreement  **2.2** Negotiate service agreements with other parties  **2.3** Liaise effectively with other parties during negotiation of service agreements  **2.4** Agree, obtain and record necessary approvals and endorsements |  |  |  |  |
| **3.1** Implement agreed criteria for monitoring, analysing and evaluating the effectiveness of service agreements  **3.2** Identify, agree and meet the support needs of other parties  **3.3** Facilitate the renegotiation of service agreements to maintain the effectiveness of the service |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**Y/602/5208 Prepare and set up mediation**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Summarise and apply the principles of mediation  **1.2** Explain to parties the potential and limitations of mediation, realistically and objectively  **1.3** Confirm each party’s understanding and where necessary clarify information  **1.4** Explain alternative options in situations where mediation or the mediator are inappropriate |  |  |  |  |
| **2.1** Clarify information, which may include rephrasing some of the information  **2.2** Establish commitment from the parties and determine what this is likely to involve  **2.3** Encourage parties to make informed decisions and to exercise autonomy when reviewing other options  **2.4** Encourage parties to express their feelings and concerns about the mediation process |  |  |  |  |
| **3.1** Identify the likely conditions of the mediation process  **3.2** Consider and agree the appropriateness of the location and venue  **3.3** Explain and clarify roles and how impartiality will be maintained  **3.4** Explain how mediation relates to the legal position of each party  **3.5** Evaluate the outcomes of mediation |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**D/602/5209 Stage and manage the mediation process**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Summarise the interventions which may be used in facilitating parties to express concerns and issues  **1.2** Support each party to identify issues and agree an agenda for discussion  **1.3** Identify the alternative options which might be applicable including referral to other agencies or other mediators |  |  |  |  |
| **2.1** Evaluate the interventions which may need to be used in facilitating the gathering and exchange of information  **2.2** Facilitate the gathering and exchanging of information between parties  **2.3** Respect and manage differences of position  **2.4** Encourage parties to acknowledge each other’s perspective  **2.5** Clarify and respect issues of confidentiality |  |  |  |  |
| **3.1** Describe the range of interventions which can be used in facilitating parties to explore and evaluate options  **3.2** Ensure that the timing for exploring options and proposals is appropriate to the progress made in the mediation process  **3.3** Reassure parties about confidentiality and the safety and security of discussing options  **3.4** Focus discussions primarily on future possibilities rather than on past events  **3.5** Facilitate parties in exploring and evaluating the implications, consequences and practicalities of the options  **3.6** Identify how further options can be accessed, where progress cannot be made |  |  |  |  |
| **4.1** Summarise the interventions which may be used in building and securing agreements  **4.2** Ensure that any agreement is the result of a joint decision between parties  **4.3** Identify and agree alternative suggestions where necessary  **4.4** Identify moments when decisions or compromises on options can be made  **4.5** Identify the basis of an agreement with the parties in order to ensure ownership  **4.6** Record agreements in a suitable format |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**R/602/5210 Understand the importance of legislation and procedures - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Explain the current, national, local, professional, and organisational requirements that relate to their role including: Equal opportunities Discrimination Health and Safety Security Confidentiality  **1.2** Explain the importance of complying with national, local, professional and organisational requirements  **1.3** Explain the consequences of non-compliance |  |  |  |  |
| **2.1** Explain what types of situation may occur that require immediate action  **2.2** Explain what actions should be taken to deal with different situations  **2.3** Explain who can be referred to for assistance in situations where immediate action is required |  |  |  |  |
| **3.1** Record contacts, interactions, agreements and information provided in the appropriate systems  **3.2** Explain what systems are used for recording these interactions  **3.3** Explain why it is important to use these systems  **3.4** Describe any procedures relating to the use of these systems |  |  |  |  |
| **4.1** Explain the actual or potential effect of own values, beliefs, attitudes and behaviours when working |  |  |  |  |
| **5.1** Explain how to assess the effectiveness of methods  **5.2** Explain why the effectiveness of methods may vary with different clients  **5.3** Explain the types of issue that might arise  **5.4** Explain the actions that may be taken to address these issues  **5.5** Explain the implications of not addressing these issues |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**F/602/5140 Develop interactions with advice and guidance clients - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Create a suitable environment for the client to be comfortable to express their issues and concerns  **1.2** Encourage the client to explore their requirements, their ideas for achieving them and any potential barriers to achievement  **1.3** Encourage clients to set priorities  **1.4** Identify a range of communication skills that could be used to work effectively with clients |  |  |  |  |
| **2.1** Recognise the nature and stage of the interaction and provide opportunities to sustain this  **2.2** Encourage clients to provide additional information  **2.3** Manage any inappropriate information given by clients |  |  |  |  |
| **3.1** Provide clear opportunities for clients to end the interaction  **3.2** Allow clients to decide on the next steps and agree with them any further activities or support that is needed  **3.3** Review the interaction and summarise the points made |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**R/602/5143 Assist advice and guidance clients to decide on a course of action**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Use appropriate language and pace of communication to encourage clients to identify their requirements and ideas for achieving them  **1.2** Identify and agree requirements that cannot be met.  **1.3** Explain to the client what other sources of support may be available |  |  |  |  |
| **2.1** Negotiate with the client the boundaries of the interactions |  |  |  |  |
| **3.1** Encourage clients to explore their decision making process and review their priorities.  **3.2** Identify unrealistic requirements and identify possible alternatives.  **3.3** Review with the clients the advantages and disadvantages of the selected options |  |  |  |  |
| **4.1** Assist clients to reach a decision on the most appropriate course of action  **4.2** Confirm the client’s autonomy in the decision making process  **4.3** Identify any problems with the chosen course of action and encourage the client to take appropriate action to address them |  |  |  |  |
| **5.1** Explain why it is important to confirm the autonomy of the client |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**A/602/5153 Prepare clients through advice and guidance for the implementation of a course of action**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Confirm the course of action with the client and the roles and responsibilities of those involved  **1.2** Explore the potential advantages and disadvantages of the chosen course of action, including the timescales and any cost implications  **1.3** Identify any unrealistic expectations and explore possible modifications |  |  |  |  |
| **2.1** Incorporate relevant information into the action plan  **2.2** Ensure the plan specifies methods, timescales, and responsibilities  **2.3** Produce the plan in the agreed format and review it with the client  **2.4** Agree the process for future reviews |  |  |  |  |
| **3.1** Identify potential methods for implementing the course of action and identify any potential difficulties  **3.2** Confirm with clients their understanding of the action plan  **3.3** Obtain agreement from the client for action plan to commence |  |  |  |  |

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Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**J/602/5172 Assist clients through advice and guidance to review their achievement of a course of action**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Explain the relevant models of good practice for assisting clients to review progress  **1.2** Explain what types of review should take place and how often these should be carried out |  |  |  |  |
| **2.1** Provide suitable opportunities for clients to review progress and achievements of the course of action.  **2.2** Provide suitable feedback to the clients |  |  |  |  |
| **3.1** Identify and agree with the client the objectives that have been achieved and those that have not  **3.2** Identify the methods that were most effective  **3.3** Review the suitability of the methods used by the clients |  |  |  |  |

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