
Overview

This standard is about working with clients to develop an action plan for implementation. It is aimed at people who provide advice and guidance to clients who use services such as public services, education and training, health services and those provided by community social welfare advice providers professionals and others.

The standard looks at developing plans by identifying and prioritising the key objectives, incorporating chosen actions into action plans and identifying any further actions required.

Performance criteria

You must be able to:

1. comply with all relevant legal, professional and organisational requirements, policies, procedures and guidelines when developing actions plans
2. discuss potential actions with clients that could meet their needs and agree an action plan
3. discuss with clients any difficulties or barriers in achieving the actions within the plan
4. identify methods for implementing courses of action
5. provide rationale to clients or other relevant parties for any significant changes to action plans
6. identify with clients any requirements that cannot be met through their action plan
7. establish alternative actions to deal with requirements that cannot be met through their action plan, agree the actions and implementation of these with clients including methods, timescales and responsibilities for delivering clients' requirements
8. produce action plans in agreed format with required information
9. agree with clients the process for reviewing the implementation of action plans
10. review the content of action plans with clients in ways that meet their needs
11. prioritise the key objectives and stages of action plans with clients in ways that meet their needs
12. record action plans in line with organisational requirements

Knowledge and understanding

You need to know and understand:

1. legislation, codes of practice, organisational requirements, policies and procedures relevant to your role and responsibilities
2. the importance of complying with relevant legal, professional and organisational requirements, policies, procedures and guidelines relevant to your role.
3. different methods of communication and how to adapt them to suit the needs, preferences, and accessibility requirements of clients, ensuring inclusive practices.
4. why it is important to confirm courses of action with clients
5. what is involved in different types of actions and the potential advantages and disadvantages of activities
6. the range of services and support available and how to access them
7. difficulties or barriers to achieving required actions within the parameters of the plan and why it is important to discuss these with clients.
8. resources required by relevant parties
9. how each stage contributes to the overall activity
10. expectations that might be proposed and how to ensure they are realistic and achievable
11. additional information that might be required by different clients
12. what the methods, timescales and responsibilities are for delivering different requirements and how to incorporate them into action plans
13. how to check the feasibility of action plans and factors that might affect this
14. different formats for action plans
15. types of supporting documentation that might be required with action plans
16. why it is important to monitor and review action plans with clients, how often should they be reviewed and what type of review should take place
17. why it is important to confirm clients' decisions on courses of action and how to do this
18. the methods for implementing different courses of action and why it is important to agree these with clients
19. why it is important to provide rationale for any changes to action plans and alternative actions that could be taken
20. alternative actions that might be taken to deal with requirements that cannot be met through action plans

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21. why it is important to reach agreement for the implementation to commence and how to confirm understanding of this by clients
 22. organisational and legal recording requirements, including how to store recorded information securely
 23. workplace requirements on equality, diversity and inclusion
 24. trauma informed principles and safeguarding requirements

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Work with clients to develop an action plan for implementation



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