

## Overview

This standard is about assisting clients through advice and guidance to review their achievement of action plans. 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 and others.

## Performance criteria

### *You must be able to:*

1. comply with all relevant legal, professional and organisational policies, procedures and guidelines in relation to assisting clients to review achievement of action plans
2. provide opportunities for clients to reflect on and review the progress and achievements against agreed actions
3. provide suitable opportunities for clients to discuss feedback on progress
4. confirm the agreed actions that were taken in ways that meet the needs of clients
5. review the key objectives and stages of the action plan with the client
6. review and update action plan in line with current achievements and client circumstances
7. agree with clients the objectives that have been achieved and those that have not
8. review the suitability of methods used by clients to implement the action plan in line with recognised good practice
9. identify issues faced during the implementation of the action plan
10. record interactions in accordance with organisational requirements and data protection

## Knowledge and understanding

### *You need to know and understand:*

1. legislation, codes of practice, organisational policies, procedures and guidelines in relation to supporting clients to review actions plans.
2. the importance of complying with relevant legal, professional and organisational requirements 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. relevant models of good practice for assisting clients to review their achievements
5. procedures for reviewing progress, including how often progress and achievements should be reviewed
6. how to establish the actions that have been taken
7. how to review key objectives and stages
8. how to identify the achievements
9. what the indications are that objectives have not been achieved
10. methods used for implementing different action plans
11. why different methods might be suitable for clients and what types of problems can be encountered by clients using different methods
12. how to assess the effectiveness of different methods
13. types of issues that could occur, actions to take to address them and implications of not addressing them
14. how to appropriately review and revise action plans
15. what types of feedback should be provided and how to give appropriate feedback
16. organisational and legal recording requirements, including how to store recorded information securely
17. workplace requirements on equity, equality, diversity and inclusion.
18. trauma informed principles and safeguarding requirements

Support clients to review action plans

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**Relevant Occupations** Education and Training, Health, Public Services and Care, Housing Advisors, Public Service Professionals

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**Suite** Advice and Guidance

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