

Competency Framework for the Information, Advice and Assistance (IAA) Workforce

Section 5: The assessment and care and support planning process

There is some indicative mapping against the roles of 'information, advice and assistance'. Each local authority and/or agency should however, make a judgement against the roles and functions of their workers.

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
1. Understand the process and requirements for assessment and care and support planning	Knowledge and understanding about:					
	1.1 Legislation, national and local policy and guidance related to assessing the needs of individuals and carers	X	X	X		Signature: Date:
	1.2 How the national assessment and eligibility tool is used for assessments			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	1.3 The reasons for the 'National Minimum Core Data Set' and how this should be used			X		Signature: Date:
	1.4 The importance of the five elements of assessment			X		Signature: Date:
	1.5 Key elements of an assessment of need Key elements: co-production, strengths-based approach, outcome focused			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	1.6 The primary focus of assessment Primary focus: building on an individual's strengths and assets, including their abilities and families/communities			X		Signature: Date:
	1.7 What is meant by 'outcomes orientated' assessment			X		Signature: Date:
	1.8 The rights of individuals and carers to access advocacy support for their assessment			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	1.9 Requirements for providing and reviewing care and support plans			X		Signature: Date:
	1.10 Principles of, format and content requirements of care and support plans			X		Signature: Date:
	1.11 How judgement is made about eligible care and support needs			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	1.12 Legislation related to 'ordinary residence' and the impact this has on the care and support that individuals are able to access			X		Signature: Date:
	1.13 The aims of legislation and policy for the use of direct payments for care and support			X		Signature: Date:
	1.14 Requirements for the use of direct payments			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	1.15 The range of services and delivery methods for which direct payments may be used			X		Signature: Date:
	1.16 Potential difficulties and conflicts related to the use of direct payments and how these may be addressed			X		Signature: Date:
	1.17 Support available for the use of direct payments	X	X	X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	1.18 Charging arrangements for eligible care and support in local area	X	X	X		Signature: Date:
	1.19 Responsibilities of local authorities for assessment of adults and children in the secure estate			X		Signature: Date:
	1.20 When an integrated/specialist assessment may be required and who may be involved in this			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
2. How to have meaningful conversations with individuals and their families/carers about what matters to them and the support they need	Knowledge and understanding about:					
	2.1 The range of communication methods and approaches that can be used	X	X	X		Signature: Date:
	2.2 Factors that need to be considered for effective communication	X	X	X		Signature: Date:
	2.3 How previous experiences, disability/conditions and first language may influence an individual's willingness to communicate	X	X	X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	2.4 Approaches that can be used for implementing the 'Active Offer'	X	X	X		Signature: Date:
	2.5 How to recognise when behaviour is being used as a form of communication	X	X	X		Signature: Date:
	2.6 Sources of information, advice and support for communication	X	X	X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	3.8 Strategies that can be used to manage challenges and sensitivities			X		Signature: Date:
	3.9 The importance of ensuring a non-judgemental approach towards the personal circumstances, of individuals, their families/carers and the way that they lead their lives	X	X	X		Signature: Date:
	3.10 How mental capacity and best interest decisions relate to the assessment process			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	3.11 How to establish individuals' views, wishes and preferences where they do not have verbal communication or mental capacity			X		Signature: Date:
	3.12 What is meant by 'advance' planning and when and why this should be considered as part of the assessment process			X		Signature: Date:
	3.13 How to establish eligible and ineligible needs when undertaking assessments			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	<ul style="list-style-type: none"> • explore the use of electronic assistive technology that may contribute to achievement of identified outcomes • balance their rights, responsibilities and risks • maintain existing and develop new relationships 			X		
	3.20 Use strategies to manage conflicts of interest, differences of opinion and dilemmas that may arise between individuals, families/carers and others about risks and outcomes that individuals want to achieve			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
4. Develop care and support plans based on assessment and agreed outcomes	Practice You are able to work in ways that:					
	4.1 Use assessments in co-production with individuals and/or carers to develop strengths-based, outcome focused care and support plans that identify: <ul style="list-style-type: none"> • support from families, friends, networks and communities • potential risks and how these may be managed 			X		Signature: Date:
	4.2 Ensure the plans include an element of flexibility to support positive outcomes			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	4.3 Ensure the plans are recorded and made available in accessible formats for people and/or carers			X		Signature: Date:
	4.4 Ensure that individuals and their families/carers are satisfied with the content of the care and support plan			X		Signature: Date:
	4.5 Agree actions, roles, responsibilities and timeframes for completing these with individuals and their families/carers			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	4.6 Support individuals and/or families/carers to understand how the plan will be implemented			X		Signature: Date:
	4.7 Agree how the plan will be monitored, reviewed and adapted to meet changing needs			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
5. Undertake reviews of care and support plans according to own role and responsibilities, legislation and Codes of Practice	Knowledge and understanding about:					
	5.1 The legislative requirements for the reviews of care and support plans			X		Signature: Date:
	5.2 The process that should be followed for the review of care and support plans			X		Signature: Date:
	5.3 Methods and approaches that can be used to support individuals to evaluate the achievement of identified outcomes in the care and support plan			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	5.6 Support individuals and/or carers to evaluate the achievement of identified outcomes from their care and support plans			X		Signature: Date:
	5.7 Explore any changes to individuals and/or carers views, wishes, preferences and needs and agree how these may best be met			X		Signature: Date:
	5.8 Seek feedback from service providers on the achievement of outcomes and any identified changes			X		Signature: Date:

Learning outcome	Training, learning, development and practice standards	Information	Information and advice	Information, advice and assistance	Evidence	Signature and date
	5.9 Ensure that: <ul style="list-style-type: none"> the reviewed plans are recorded and made available in accessible formats for individuals and/or carers individuals and/or carers are happy with any changes made 			X		Signature: Date:
	5.10 Ensure that revised plans are shared appropriately with service providers according to agreed protocols for confidentiality			X		Signature: Date:

Teaching resources for section 5 - set of power point slides which can be delivered as a whole, or split up for standalone delivery for each learning outcome or specific criteria for knowledge and understanding

I confirm that has demonstrated achievement of the knowledge learning outcomes set out in section 5 of the Information, Advice and Assistance Competency Framework in accordance with their role and responsibilities.

Signed and dated: (manager).....

Date:.....

Signed and dated: (worker).....

Date:.....