

DW4: Provide information to clients

This unit is tailored from the National Occupational Standards for Advice and Guidance (ENTO), where it appears as Unit AG2

OVERVIEW	PERFORMANCE CRITERIA
<p>This Unit is for you if your role is the provision of information to clients. The information may be in written format or may be provided orally. Other formats and communication methods, e.g. signing, Braille etc. may also be used according to the needs of the client.</p> <p><i>“Clients” in the context of this unit means groups, groups of individuals, etc.</i></p> <p>The Unit requires you to:</p> <ul style="list-style-type: none"> • Identify the information required by clients • Provide information to meet the needs of clients <p>As a development worker the information provided may relate to one or more of the following, for example:</p> <ul style="list-style-type: none"> • Communication • Data protection • Developing social enterprise • Environmental issues • Equality and diversity • Finance • Fundraising/Income generation • Governance • Human resources • Information systems/ICT • Insurance • Learning and development • Legal advice (sources of...) • Marketing/promotion • Networks/ing • Partnership working • Performance monitoring and improvement • Policies and procedures • Procurement/tendering • Project management • Strategy/foresight • Working with volunteers • Working to regulatory frameworks 	<p>You must be able to:</p> <ol style="list-style-type: none"> 1. Explore with the client their reasons for their information needs 2. Assess correctly the client’s needs for information 3. Confirm the information required with the client 4. Agree with the client how the information will be provided 5. Refer clients to additional or alternative sources of relevant information 6. Comply with all relevant legislation, codes of practice, guidelines and ethical requirements 7. Retrieve relevant information from the appropriate systems 8. Provide sufficient and suitable information to meet client’s needs 9. Make sure the information provided is current and capable of meeting a diverse range of needs 10. Check client’s understanding of the information 11. Assist clients to obtain other relevant information 12. Identify any problems with providing the information and take appropriate action to address them 13. Agree with clients any further activities that are necessary to meet their needs

KNOWLEDGE AND UNDERSTANDING

You need to know and understand the following:

- a) The different reasons clients may have for seeking information
- b) The kinds of information that may be sought
- c) How to assess clients' needs
- d) Why it is important to confirm the information required with clients
- e) Why it is important to agree how the information will be provided
- f) What other sources of information could help the clients
- g) The relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality and data protection
- h) Why it is important to comply with different requirements and the consequences of non-compliance
- i) How to obtain information on the requirements
- j) The different methods that are available for providing information
- k) How information can be presented in different formats
- l) Organisational systems for recording information and why it is important to use the systems
- m) How much information should be provided for different clients
- n) What type of information is suitable
- o) How to check the currency, accuracy and suitability of the information that is provided
- p) How to ensure the information is free from stereotypes and is not biased
- q) How to check clients' understanding of the information
- r) What other sources of information are available
- s) What additional information is available
- t) How to contract external organisations to undertake research and provide information if necessary and the organisations procedures for such procurement
- u) What are the types of problem that could occur and what actions can be taken to address them