

About the Level 2 Award/Certificate in Information, Advice or Guidance

Information, advice and guidance cover a range of activities, such as:

- **Providing information** in a variety of formats – paper based, letter, online or email, over the telephone.
- **Offering advice**, and signposting people to sources of further information and organisations that can provide help or support.
- **Supporting people** in their chosen path and producing individual action plans, with step-by-step instructions, to guide an individual to reach their goal.

This programme will help you to develop the skills and knowledge required to give information, advice and guidance to individuals or groups. The materials will help you to work towards the Level 2 Award and Certificate in Information, Advice or Guidance.

To achieve the Award you must complete the workbook and assessment for Module A. To achieve the Certificate you must complete the workbooks and assessments for both Module A and Module B.

You do not need to be working in a formal advice and guidance role, but if you are not you must choose an organisation that you can investigate, and which you will then use to answer the activities and assessments.

Aims

On completion of the Award (Module A) you should:

- Understand how to interact with clients and know the importance of effective communication skills.
- Recognise how your own values and beliefs affect your role, and understand the need for confidentiality and impartiality when offering information, advice and guidance.
- Be able to create action plans and understand how to develop your own interaction skills.
- Know the difference between information, advice and guidance, and identify ways of meeting the needs of clients, recognising the boundaries of your own role.
- Understand the purpose of accurate record keeping.

Aims *continued*

On completion of the Certificate (Modules A and B) you should:

- Recognise the role of group work in information, advice and guidance as well as the factors that can influence the effectiveness of group sessions.
- Plan, conduct and evaluate information, advice and guidance sessions.
- Identify the resources and media available to provide information, advice and guidance.
- Understand how systems for information storage and retrieval operate.
- Identify the difference between signposting and referral, and when it is appropriate to signpost or refer clients to other agencies.
- Recognise and apply good practice when referring or signposting clients.
- Monitor and evaluate client referrals.

If you are not certain which qualification you are working towards, ask your tutor/assessor.

Course content

This course has five units. They have been grouped together into the following two modules:

Module A

Unit 1: Developing interaction skills for information, advice or guidance (Y/502/7983) - 3 credits

Unit 2: Information, advice or guidance in practice (D/502/7984) - 3 credits

Module B

Unit 3: Information, advice or guidance work with groups (L/502/7995) - 3 credits

Unit 4: Managing information (A/502/7989) - 3 credits

Unit 5: Signposting and referral - information, advice or guidance (F/502/7668) - 3 credits

Assessment

These course materials are designed so that you can work through them at your own pace, after agreeing completion times with your tutor/assessor.

Self-assessed activities

Each workbook includes a number of activities that will help you to practise what you have learned and reflect on your understanding. These are 'self-assessed' activities, meaning that you do not need to show the completed activities to your tutor/assessor, but you should check your answers with the information provided in the workbook to make sure you have understood the subject covered by the activity.

By applying what you learn to your own situation you should strengthen your knowledge and have some material for the tutor-assessed assignments. Completing these activities and reflecting on your answers will help you to identify your strengths and areas for improvement, and prepare you for successfully completing the course.

Tutor-assessed activities

Each unit in this course is split into a number of sections. At the end of each section you will be asked to complete the assessment questions for that section. These questions can be found in a separate assessment booklet for the module you are working through.

When you have completed all the assessments for each module, you should submit them to your tutor/assessor for marking and feedback.

Once you have successfully completed your assessments, you will have achieved the qualification you are working towards and will receive a certificate.

Sources of information and support

You may find these organisations' websites useful while working through your course.

GOV.UK

This website brings together all government departments and many other agencies and public bodies. It includes their policies, announcements, publications, statistics and consultations.

Website: www.gov.uk

Citizens Advice

Citizens Advice is a charity that provides free, independent advice on a range of issues.

Website: www.citizensadvice.org.uk

Trades Union Congress (TUC)

The TUC is the umbrella body representing all of Britain's trades unions. It provides information about a range of issues relating to employment rights and other issues related to employment.

Website: www.tuc.org.uk

National Council for Voluntary Organisations (NCVO)

This body offers a wide range of advice and support leaflets useful for voluntary organisations and community groups.

Website: www.ncvo.org.uk

Good luck with your studies!

Introduction to Unit 1

This unit contains five sections:

Section 1: How to interact with clients

Section 2: Effective communication and listening skills in delivering information, advice and guidance

Section 3: How your own values, beliefs and attitudes may affect interactions with clients

Section 4: The importance of confidentiality and impartiality in interactions with clients

Section 5: Developing your own interaction skills

In this unit you will learn how to offer information, advice and guidance to individuals and groups of people looking for help to progress in their learning and work.

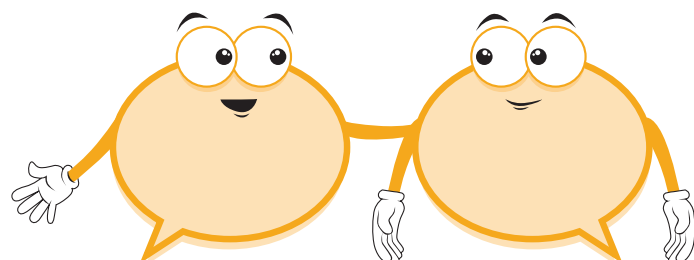
Section 1 will guide you on the basics of **how to interact with clients**. You will learn about different types of interaction, including face-to-face, and how to reach a shared agreement with clients.

In Section 2 you will find out more about **effective communication and listening skills**, to help you to understand the importance of communicating and listening in an interaction with a client.

In Section 3 you will investigate how our own **values and beliefs** affect the way we perceive and relate to others, and how we may stereotype groups of people because of their appearance, gender, age, ethnicity or ability. By the end of this section you should be aware of some of your own personal prejudices and attitude to others, and how to overcome these when interacting with people from different backgrounds.

Section 4 explores the principles of **confidentiality and data protection** and how to follow these when interacting with clients within information, advice and guidance. We will also look at the importance of impartiality, and how to maintain this when delivering a service.

In the final section of this unit you will look at what **personal strengths and skills** you have, and identify skills you may need to develop further to be more successful in your current and future roles.



How to interact with clients

In this section you will learn about:

- **Ways of interacting**
- **Face-to-face interactions**
- **Positive interactions**

You will explore the **different types of interactions** that may take place within information, advice and guidance.

Select a place of work to base your learning on – it could be where you currently work or volunteer, or somewhere you have previously worked. Alternatively, you could choose a college you have attended.



Activity A1

Identify your chosen place of work or learning – write it in the space below and summarise what the organisation does.

Blank space for writing the answer to Activity A1.

Ways of interacting

An interaction is a communication between two or more people and can happen in many ways, including face-to-face, over the telephone or in writing.

Interaction skills are important when giving information, advice and guidance, to **make sure clear messages are given and are fully understood** by both the adviser and the client. A variety of organisations offer information, advice and guidance, and they may have different ways of referring to the people they assist, calling them 'clients', 'customers' or 'service users'. We will use the term 'clients' throughout this course.

There are many reasons why people may contact an information, advice and guidance practitioner, including:

- Childcare provision.
- Debt or housing.
- Transport options.
- Redundancy.
- Health and well-being.
- Learning activity or training course.
- Career prospects or returning to work.

Interacting face-to-face with clients can be done in a variety of ways, such as in one-to-one meetings, or in small groups. Part of the adviser's role is **ensuring information and advice is given in an appropriate format** and in the way a client will understand.



Activity A2

What are the different ways of interacting with clients? List them below.

A large, empty rectangular box with a light orange border, intended for students to list different ways of interacting with clients.

Here are some ways of interacting that you may have thought of:

- **Face-to-face** - Interacting in person. This could be a **one-to-one interaction** with an individual, suitable when in-depth discussion is required or when covering more than one issue, or a **small or large group**, suitable when several people are interested in a similar subject and when group participation is needed.
- **Speaking over the telephone** - A good approach when a **quick response** or answer is required.
- **Communicating in writing** - This could be by letter, email or fax, and is often used to **pass on information or confirm a previous discussion**.
- **Websites, forums** - The internet is a good tool for sharing information, views or opinions, and for searching for information. However, remember that information on the internet can sometimes be inaccurate or out of date, so you should only use well-known or official websites to source information. Information obtained from forums should be checked against another official or reliable source.
- **Information leaflets, posters, cards** - These are a good way to share **detailed and factual** information.

Recognising what type of interaction is appropriate allows an adviser to deliver a professional service, leading to high client satisfaction, which can enhance the reputation of a service and encourage clients to use it again and recommend it to others.

Key point

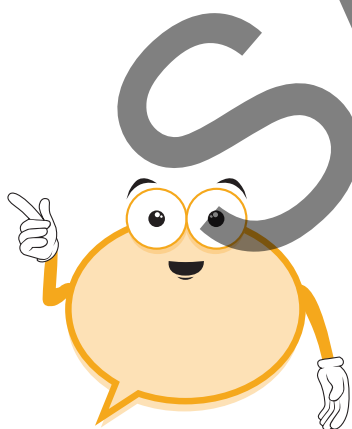
You must interact with clients using the appropriate method in order to meet their needs.

Face-to-face interactions

In many advice services most of the interactions will be face-to-face, either in a one-to-one situation or in a group setting.

If someone wants to discuss **personal, sensitive or complex issues**, a one-to-one interaction would be most appropriate, where this is possible. Group situations work best when several people are looking for **similar information or advice**. Group situations can also be used where active participation and exchanging ideas and opinions with others would be of benefit to the individual.

However, people may be too busy or too far away to be able to attend face-to-face meetings. In such cases, communication may take place in other ways – for example via a webcam, online meetings, webinars or instant messaging.



**Activity A3**

Choose three different situations where you may need to give advice. For each one, suggest the most appropriate way of communicating:

a)

b)

c)

SAMPLE

Check your answer in the 'Answers to activities' at the end of this module.

Steps in an interaction

Interactions may take place in a variety of ways, but most will follow a familiar pattern. The following figure is an example of how the **steps in an interaction** could be presented as a flowchart.

**LEVEL 2 AWARD/CERTIFICATE IN
INFORMATION, ADVICE OR GUIDANCE**

Module A assessment

After completing your assessment please return it to your tutor/assessor

ADVICE TO ALL CANDIDATES

- Please complete your personal details and candidate statement below.
- Complete all questions in this assessment.
- Write your answers in the spaces provided. Add any additional work for any of the questions on plain paper and attach to this assessment.
- You do not need to return your completed activities for the units – just this assessment.
- If you require any assistance or guidance please contact your tutor/assessor.

PERSONAL DETAILS

Name _____

Contact address _____

Postcode _____

Telephone no. (evening) _____ (day) _____

Email (home) _____ (work) _____

CANDIDATE STATEMENT

I certify that I began the learning materials for Units 1 and 2 (Module A) on _____*
and have completed all sections in this assessment. I confirm that this is my own work.

Signature _____ Date _____

*Please insert the date you started working through the course materials for the module.

For office use only

Candidate ref: _____

Assessor: _____

IV: _____

Passed

Date _____

Re-submit

Date _____

Tutor feedback:

Written

Telephone

Personal tutorial

SAMPLE

Assessment 1.1: How to interact with clients

(The reference in brackets at the end of each task refers to the assessment criteria for the learning outcomes of this qualification and is for your tutor's/assessor's use.)

1. Describe an appropriate model for interactions with individual clients. (1.1)

2. Give reasons for using a structured approach for interactions. (1.2)

SAMPLE

3. Describe how to reach a shared agreement with clients. (1.3)

SAMPLE