

Unit overview

Elements of competence

427a	Identify the needs, vulnerabilities and circumstances of carers and families
427b	Evaluate and review the needs, vulnerabilities and circumstances of carers and families
427c	Make and present assessments of the needs, vulnerabilities and circumstances of carers and families

About this unit

For this unit you need to be able to establish the strengths, vulnerabilities, needs and circumstances of carers and families and use this information to assess their support needs.

Scope

The scope is here to give you guidance on possible areas to be covered in this unit. The terms in this section give you a list of options linked with items in the performance criteria. You need to provide evidence for any option related to your work.

Assessment in relation to: planning support for carers and families of individuals new to the service; planning support following a reassessment and review.

Factors you take into account are in relation to: the support programme being provided for the individual with mental health needs and the nature of those needs; the strengths, vulnerabilities, needs, circumstances and preferences of carers and families; available resources; relevant statutory requirements; the policies and priorities of service providers.

Information you check and take into account information that is gathered: through interview, discussion with and submissions from carers, families and the individual with mental health needs; through information provided from other service providers, agencies and practitioners; from previous formal and informal assessments.

Need for further support: no further support needed; support provided by your own agency; seeking information and support from other agencies on behalf of the carers/families; carers/families seeking support from other agencies.

Present assessments: in writing; orally.

Support and other services include: information; practical assistance; counselling and emotional support; self-help groups; respite; advocacy; wider community support eg cultural or religious.

Key words and concepts

This section provides explanations and definitions of the key words and concepts used in this unit. In occupational standards it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standards, may be used in a very particular way.

Therefore, we would encourage you to read this section carefully before you begin working with the standards and to refer back to this section as required.

Carers and families	Is used to mean any persons who have an active and on-going informal role in caring for the individual, including those with a familial relationship to the individual. Partners, where they exist, would be considered as family members. The individual needs may be an adult of working age, a child or adolescent or an older person
Circumstances	Of carers and families may be in relation to social, economic and/or physical factors (including health and living space/facilities) which influence their capability to provide care for the individual
Vulnerabilities and needs	Of carers and families may be in relation to support and/or protection

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ASSESS THE NEEDS OF CARERS AND FAMILIES

427a Identify the needs, vulnerabilities and circumstances of carers and families

Performance criteria

You need to show that:

- 1 You encourage and support **carers and families** to express their own views and feelings about their strengths, **vulnerabilities**, **needs** and **circumstances**
- 2 You show sensitivity to the situation and feelings of carers and families when gathering information from them about their strengths, vulnerabilities, needs and circumstances
- 3 You enable carers and families to explore fully the nature and extent of their strengths, vulnerabilities, needs and circumstances
- 4 You help carers and families to identify for themselves which of their needs are priorities and to explore what would help to address them
- 5 You explain clearly to carers and families the range of support and other services available from:
 - your own agency
 - other agencies who may be able to provide relevant services
- 6 You encourage carers and families to express their own wishes and preferences about how their needs should be met
- 7 You discuss and agree with carers and families their need for further support
- 8 You check and confirm the accuracy of information provided with the carers and families
- 9 You negotiate agreement on the information which will need to be shared, and with whom, in accordance with agency and legislative requirements
- 10 You make accurate, legible and complete records of:
 - the strengths, vulnerabilities, needs and circumstances carers and family
 - agreements reached with themin accordance with agency policy on the recording of information

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ASSESS THE NEEDS OF CARERS AND FAMILIES

427b

Evaluate and review the needs, vulnerabilities and circumstances of carers and families

Performance criteria

You must show that:

- 1 You check all information received for relevance, currency and reliability in relation to the assessment being undertaken
- 2 You identify and take steps to address any gaps in the information which may affect the review process
- 3 You take account of all gathered information in your evaluation, weighing the implications in line with the policies, practices and priorities of the service provider
- 4 You identify and take account of any conflict of interest between the programme of support for the individual and the strengths, vulnerabilities, needs and circumstances of the carers/family
- 5 You take full account of the personal beliefs, experiences and preferences of the carers/families
- 6 You avoid stereotyping and personal bias when considering the strengths, vulnerabilities, needs, and circumstances of carers and families
- 7 You offer views, opinions and suggestions to carers and families in a way which is non-threatening and sensitive to your power and authority
- 8 You provide appropriate support to enable carers and families to understand their rights and responsibilities and play an active part in the review process

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ASSESS THE NEEDS OF CARERS AND FAMILIES

427c

Make and present assessments of the needs, vulnerabilities and circumstances of carers and families

Performance criteria

You need to show that:

- 1 You prioritise identified needs, taking account of all the factors relevant to the carers/families situation
- 2 You evaluate the strengths and weaknesses of possible options for providing support
- 3 You arrange for additional or specialist involvement in the assessment within an appropriate timescale, where this is needed to allow a decision to be reached
- 4 You record instances where the preferred options for support are not consistent with organisational priorities and make recommendations on the situation to the relevant authorities
- 5 You present your assessments clearly
- 6 You keep accurate, complete and up-to-date records of assessments consistent with agency policy and procedures and statutory requirements
- 7 You make complete and accurate records of any gap between identified needs and the availability of resources and services to meet those needs, including any risk arising from this, and pass these to the appropriate people

Knowledge specification for the whole of this unit

Competent practice is a combination of the application of skills and knowledge informed by values and ethics. This specification details the knowledge and understanding required to carry out competent practice in the performance described in this unit. When using this specification **it is important to read the knowledge requirements in relation to expectations and requirements of your job role.**

Legislation and organisational policy and procedures

- 1 Relevant legislation and how this should inform the assessment of the needs of carers and families
- 2 How the legislative framework affects service provider policy and practices in relation to recognising and supporting carers and families
- 3 Relevant legislation and its implications for the recording, storing and sharing of information
- 4 The purpose and priorities of your own agency and other service providers and how these influence the kinds of support offered

Theory and practice

- 5 Theories and methods relating to the assessment of need and the identification of preferred outcomes, including the role of negotiation and mediation
- 6 Theories and methods of promoting participation in different circumstances and with different carers and families
- 7 Methods of mapping resources, strengths, limitations and gaps when assessing need and identifying preferred outcomes and prioritising options
- 8 How to evaluate when additional or specialist assessment is required
- 9 How to write reports
- 10 How to prepare for and make presentations
- 11 To whom you should report any unmet needs and any risks arising from unmet need
- 12 The principles of needs-led assessment
- 13 Why the ability to listen effectively is important
- 14 Why it is important to identify and take account of the strengths of carers and families as well as their vulnerabilities, needs and circumstances
- 15 Why it is important to record instances where preferred options are not feasible due to the policy of your own agency or other service providers or resource constraints
- 16 Why it is important to give due weight to individual preference
- 17 The types of support available to carers and families such as self-help groups, counselling, respite, and how to access these
- 18 The range of factors that need to be taken into account when making an assessment
- 19 Ways in which the physical environment in which interviews and discussions take place can influence the participation of carers and families
- 20 The reasons why conflicts of interest may arise between the individual's needs and those of carers/families
- 21 How to communicate clearly and effectively
- 22 How to facilitate participation in the process by individuals
- 23 How to decide on the relevance and importance of information gathered and to evaluate and prioritise different aspects of need
- 24 How to take account of social, economic, physical, cultural, religious and gender factors when making an assessment of needs

Evidence requirements for this unit

- Direct observation by assessor and/or an expert witness is required for some of the performance criteria for every element in this unit.
- Prior to commencing the unit you should agree a plan with your assessor regarding the types of evidence to be used.
- You must provide your assessor with evidence for ALL the performance criteria, ALL the knowledge requirements and the relevant parts of the SCOPE as applicable to your workplace.
- The evidence must, at all times, reflect the policies and procedures of the workplaces as linked to current legislation and valued and principles for best practice within the Health and Social Care Sector. This will include the National Service Standards for your area of work or client group.
- All evidence should relate to real work activities for ALL elements of this unit.
- Simulation is NOT permitted for this unit.

Competences can be demonstrated using a variety of types of evidence from the following:

- **Work products:** these can be any record that you would normally use within your normal role eg minutes of meetings and records, procedures and policies, etc.
- **Assignment/project:** you may have already completed a project or assignment (for example from HNC, NC, VRQ, BTec courses, D32, 33, 34, A1 and V1). You could also use evidence of previous in-house training course/programmes you have completed showing professional development.
- **Reflective accounts:** you describe your actions in a particular situation(s) and reflect on the reason(s) for you practicing in that way, in relation to individuals and key people.
- **Questioning:** you and your assessor may agree on questions to demonstrate your knowledge, to supplement the knowledge demonstrated through observations, products and reflective accounts. These can be oral or written but evidence of this must be recorded.

NB Confidential records do not require to be included in your portfolio of evidence. These can remain where they are normally stored and checked by your assessor and internal verifier. If they are included, they must be anonymised.