

# 415 PRODUCE, EVALUATE AND AMEND SERVICE DELIVERY PLANS TO MEET INDIVIDUAL NEEDS AND PREFERENCES

## Unit overview

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### Elements of competence

415a	Develop service delivery plans
415b	Monitor service delivery plans
415c	Evaluate and make adjustments to service delivery plans

### About this unit

For this unit, you will be expected to develop, agree, monitor and evaluate service delivery plans for individuals requiring Health and Care services.

### 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 area.

**Communicate** using: the individual's preferred spoken language; the use of signs; symbols; pictures; writing; objects of reference; communication passports; other non verbal forms of communication; human and technological aids to communication.

**Key people** include: family; friends; carers; others with whom the individual has a supportive relationship.

**Risks** to the individuals in relation to their daily living and to risks associated with individuals who are likely to be aggressive, abusive and self-harming.

Your **knowledge and understanding** for this unit will relate to legal requirements and codes of practice applicable to the scope of your work and that of others with whom you work; your role, and level of responsibility you have within your organisation to manage activities to achieve an optimum service; the depth and breadth of understanding that will enable you carry out your job role and support others to perform competently; the need to be able to solve problems and resolve conflicts; the need to be able to evaluate, assess situations and act appropriately; systems and processes within your own and across other organisations and the need for you to be able to work in collaboration with individuals<sup>1</sup>, key people and others within and outside your organisation.

### Values underpinning the whole of the unit

The values underpinning this unit have been derived from the key purpose statement<sup>2</sup>, the statement of expectations from carers and people receiving services, relevant service standards and codes of practice for health and social care in the four UK countries. If you are working with children and young people they can be found in the principles of care unit 44. If you are working with adults they can be found in unit 45. To achieve this unit you must demonstrate that you have applied the principles of care outlined in either unit 44 or unit 45 in your practice and through your knowledge.

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<sup>1</sup>If you are working with children and young people the term "individuals" covers children and young people and "key people" covers parents, families, carers, friends and others with whom the child/young person has a supportive relationship

<sup>2</sup>The key purpose identified for those working in health and social care settings is "to provide an integrated, ethical and inclusive service, which meets agreed needs and outcomes of people requiring health and/or social care"

415

## PRODUCE, EVALUATE AND AMEND SERVICE DELIVERY PLANS TO MEET INDIVIDUAL NEEDS AND PREFERENCES

### Key words and concepts

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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.**

<b>Active support</b>	Support that encourages individuals to do as much for themselves as possible to maintain their independence and physical ability and encourages people with disabilities to maximise their own potential and independence
<b>Agreed</b>	The final form of the plan specifying if and where the services offered were not the first preference of the individual and identifying areas of concern, and conflicts of opinion/judgements
<b>Individuals</b>	The actual people requiring health and care services. Where individuals use advocates and interpreters to enable them to express their views, wishes or feelings and to speak on their behalf, the term individual within this standard covers the individual and their advocate or interpreter
<b>Information</b>	Information will include any plans, care needs assessments, records and reports relevant to the individual needs and preferences
<b>Key people</b>	Are those people who are key to an individual's health and social well-being. These are people in the individual's life who can make a difference to their health and well-being
<b>Others</b>	Are other people within and outside your organisation that are necessary for you to fulfil your job role
<b>Rights</b>	The rights that individuals have to: <ul style="list-style-type: none"><li>• be respected</li><li>• be treated equally and not be discriminated against</li><li>• be treated as an individual</li><li>• be treated in a dignified way</li><li>• privacy</li><li>• be protected from danger and harm</li><li>• be cared for in a way they choose</li><li>• access information about themselves</li><li>• communicate using their preferred methods of communication and language</li></ul>
<b>Risks</b>	The likelihood of danger, harm and/or abuse arising from anything or anyone

## 415 PRODUCE, EVALUATE AND AMEND SERVICE DELIVERY PLANS TO MEET INDIVIDUAL NEEDS AND PREFERENCES

415a Develop service delivery plans

### Performance criteria

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You need to show that:

- 1 You review relevant documents and other **information** to identify the assessed needs of **individuals**, including any specialist needs and communication requirements
- 2 You support individuals and **key people** to identify the individual's needs and preferences about the way the Health and Care services should be provided, taking account of the individual's chosen life style
- 3 You support individuals and key people to identify any implications and **risks** involved in responding to their preferences and provide **active support** to enable them to maximise their potential and maintain their independence
- 4 You work with individuals and key people to develop an **agreed** service delivery plan that:
  - identifies the areas of health and care that will be provided by the individuals family, friends and personal networks
  - identifies areas of health and care that will be provided by you and people within and outside your organisation
  - details actions to be taken by people within and outside your organisation to meet assessed needs and preferences of and outcomes for individuals
  - identifies areas of flexibility and active support to enable individuals to maximise their potential and maintain their independence
  - establishes individualised procedures for individuals about managing risks
  - identifies procedures and practices for monitoring and reviewing the plan with individuals and key people
- 5 You produce service delivery plans in a format and language:
  - appropriate to the complexity of the service to be provided
  - that is understandable and useable by all who are required to access and use them
- 6 You check the detail of the plan with individuals and key people, recording and making necessary changes to meet agreed needs, preferences and outcomes
- 7 You acquire necessary signatures when the final plan has been agreed
- 8 You ensure that the plan is held by individuals unless there are clear and recorded reasons not to do so

## 415 PRODUCE, EVALUATE AND AMEND SERVICE DELIVERY PLANS TO MEET INDIVIDUAL NEEDS AND PREFERENCES

415b Monitor service delivery plans

### **Performance criteria**

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You need to show that:

- 1 You establish procedures and practices to enable individuals, key people and **others** providing services to monitor and provide feedback on changes to individuals' needs, preferences and outcomes
- 2 You ensure that individuals and key people who can and should provide feedback on changes to the individual needs, preferences and outcomes are aware of and able to use feedback procedures and practices effectively
- 3 You collate and evaluate feedback from all sources
- 4 You seek other information and advice on the implications of any changes to service delivery plans for the individuals
- 5 You support individuals and key people to identify and agree changes that need to be made to service delivery plans to meet the individual's changing needs, preference and outcomes
- 6 You record and report on changes and proposed changes to relevant individuals and organisations within confidentiality agreements and according to legal and organisational requirements

## **415 PRODUCE, EVALUATE AND AMEND SERVICE DELIVERY PLANS TO MEET INDIVIDUAL NEEDS AND PREFERENCES**

415c Evaluate and make adjustments to service delivery plans

### **Performance criteria**

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You need to show that:

- 1 You identify legal and organisational requirements for the review of the service delivery plans
- 2 You support individuals and key people to understand and be able to use the processes and procedures set in place to review and amend service delivery plans
- 3 You ensure that those within and outside your organisation are aware of their roles and responsibilities in reviewing individual service delivery plans
- 4 You support individuals, key people and those within and outside your organisation to identify:
  - the strengths of service delivery plans in meeting the individual's needs and preferences
  - parts of the service delivery plan that could be strengthened
  - changes that need to be made
- 5 You collate and evaluate all relevant information to identify amendments needed to service delivery plans
- 6 You identify and agree changes to service delivery plans with individuals, key people and relevant people within and outside your organisation
- 7 You check the detail of the revised plan with individuals and key people and relevant people within and outside your organisation
- 8 You acquire necessary signatures when the revised plan has been agreed and provide a copy to the appropriate individuals, key people and others
- 9 You support individuals and key people to understand:
  - when changes to the service delivery plan will be made
  - how they will affect the health and care services they receive

415

## PRODUCE, EVALUATE AND AMEND SERVICE DELIVERY PLANS TO MEET INDIVIDUAL NEEDS AND PREFERENCES

### Knowledge specification for the whole of this unit

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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.**

#### Values

- 1 Legal and organisational requirements on equality, diversity, discrimination, **rights**, confidentiality and sharing of information when developing, monitoring and reviewing service delivery plans
- 2 Knowledge and practice that underpin the holistic person centred approach which enable you to work in ways that:
  - place the individuals' preferences and best interests at the centre of everything you do
  - provide active support for the individuals
  - recognise the uniqueness of individuals and their circumstances
  - empower individuals to take responsibility (as far as they are able and within any restrictions placed upon them), and make and communicate their own decisions about their lives, actions and risks when developing, monitoring and reviewing service delivery plans
- 3 How to manage ethical dilemmas and conflicts for individuals, those who use services and staff/colleagues when developing, monitoring and reviewing service delivery plans
- 4 How to challenge, and to support individuals, key people and others to challenge information, documents, systems, structures, procedures and practices that are discriminatory
- 5 The ways that health and social care values may differ from those of the individuals and key people you are working with

#### Legislation and organisational policy and procedures

- 6 Codes of practice and conduct, and standards and guidance relevant to your setting and own and the roles, responsibilities, accountability and duties of **others** when developing, monitoring and reviewing service delivery plans
- 7 Current local, UK and European legislation and organisational requirements, procedures and practices for:
  - data protection
  - health and safety
  - risk assessment and management
  - employment practices
  - protecting individuals from danger, harm and abuse
  - your responsibility for keeping yourself, individuals and others safe
  - making and dealing with complaints and whistle blowing
  - multi-disciplinary and multi-agency working
  - working in integrated ways to promote the individual's well-being
  - developing, monitoring and reviewing service delivery plans
- 8 Key government initiatives which affect the development and review of service delivery plans to meet individual needs, preferences and circumstances
- 9 How to access, evaluate and influence organisational and workplace policies, procedures and systems for developing, monitoring and reviewing service delivery plans

**415**

## **PRODUCE, EVALUATE AND AMEND SERVICE DELIVERY PLANS TO MEET INDIVIDUAL NEEDS AND PREFERENCES**

### **Knowledge specification for the whole of this unit (continued)**

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- 10 How to access and record information, decisions and judgements for service delivery plans
- 11 How different philosophies, principles, priorities and codes of practice can affect inter-agency and partnership working when developing, monitoring and reviewing service delivery plans
- 12 The resources available within and outside your organisation to develop service delivery plans that are flexible and person-centred

### **Theory and practice**

- 13 How and where to access literature, information and support to inform your practice when developing, monitoring and reviewing service delivery plans
- 14 An up-to-date knowledge of:
  - literature related to best practice in the development, monitoring and review of service delivery plans
  - government reports, inquiries and research relevant to the development, monitoring and review of service delivery plans
  - government reports, inquiries and research into serious failures to protect individuals, families, carers and other key people
- 15 Theories of:
  - facilitating empowerment and participation of individuals and key people in the development, monitoring and reviewing of service delivery plans
  - the role of family and social support networks in meeting individuals' needs
  - how social and economic circumstances may impact on individuals' social care, well-being and life chances
  - human resource management in relation to the development, monitoring and reviewing of service delivery plans
  - human growth and development
  - managing loss and change
  - how stress can affect behaviour
  - how power and influence can be used and abused when developing, monitoring and reviewing service delivery plans
  - multi-disciplinary and multi-organisational working
- 16 Knowledge of the physical, emotional and health conditions of the individuals for whom you are developing, monitoring and reviewing service delivery plans and how to use this information to make informed decisions for the content of the service delivery plans
- 17 The factors to take account of when evaluating whether your organisation has the resources (human, physical and financial) to provide the services and facilities
- 18 How to analyse, interpret and balance:
  - individual needs and preferences
  - views of key people
  - evidence, knowledge and practice based information
  - knowledge of individuals' conditions
  - resources and capacity within your organisationto enable you to assess individuals' needs and preferences, fairly and ethically
- 19 Methods of supporting individuals and key people to:
  - express their wishes, needs and preferences about the delivery of services and facilities
  - understand and take responsibility for promoting their own health and well-being
  - identify how their care needs should be met
  - assess and manage risks to their health and well-being

**415**

**PRODUCE, EVALUATE AND AMEND SERVICE  
DELIVERY PLANS TO MEET INDIVIDUAL NEEDS  
AND PREFERENCES**

**Knowledge specification for the whole of this unit (continued)**

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- 20 Methods of supporting staff to work with individuals, key people and others to implement and evaluate service delivery plans
- 21 The stages, procedures, paperwork and people involved in developing, monitoring and reviewing service delivery plans
- 22 The use of evidence, fact and knowledge based opinions in records and reports and why it is important to differentiate between these and make clear the source of evidence
- 23 How to work with individuals, key people and others within and outside your organisation to develop, monitor and review service delivery plans to meet the needs, preferences and outcomes of individuals

415

## PRODUCE, EVALUATE AND AMEND SERVICE DELIVERY PLANS TO MEET INDIVIDUAL NEEDS AND PREFERENCES

### Evidence requirements for this unit:

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- 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 and 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 service delivery plans, policies and procedures; reports and records; communication records; outline of training plans; supervision notes, 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 staff.
- **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.**