
Overview

This standard is about working directly with clients to help them gain the skills and confidence to act on their own behalf. You may provide ongoing support for the client during the proceedings, which may involve you attending, but not formally participating in the process.

There are three elements

- 1 Establish clients' needs and capabilities
- 2 Enable clients to act on their own behalf
- 3 Provide ongoing support for clients during the course of action

**Performance
criteria**

Establish clients' needs and capabilities

- You must be able to:
- P1 establish clients' capability to undertake actions on their own behalf in line with organisational requirements
 - P2 explain available options to clients in line with organisational requirements
 - P3 establish with clients the nature of their needs, expectations and who they should present their case to in line with organisational requirements
 - P4 discuss with clients their expectations to ensure they are realistic and achievable
 - P5 explain to clients the nature and extent of the support services that you can provide in line with organisational requirements
 - P1 check that clients' understanding of legal advice services is consistent with information you have provided
 - P6 check clients understand and agree to relevant legislation, codes of practice, guidelines, and ethical requirements of working with you
 - P7 record details of your agreement to work with clients in line with organisational requirements

Enable clients to act on their own behalf

- You must be able to:
- P8 agree with clients the nature and extent of the support you can provide in line with organisational requirements
 - P9 agree with clients roles and responsibilities for taking actions forward in line with organisational requirements
 - P10 provide opportunities for clients to identify the information and support they require in line with organisational requirements
 - P11 provide support to clients to help them access and present information relevant to their case
 - P12 check that clients' presentations meet the requirements set by others involved with their case
 - P13 enable clients to present their case in the best possible way in line with organisational requirements
 - P14 provide opportunities for clients to explain their position, ask and answer

questions

Provide ongoing support for clients during the course of action

- You must be able to:
- P15 agree with clients the nature and extent of the support that you will offer them on an ongoing basis
 - P16 monitor the progress against agreed criteria through review with clients
 - P17 agree with clients the steps that need to be taken to progress action, and:
 - P17.1 who is responsible for taking them
 - P18 agree with clients when the action has reached a conclusion in line with organisational requirements
 - P19 take appropriate steps to end the support to allow clients to take responsibility for future actions
 - P20 record details of the client interaction in line with organisational requirements

Knowledge and understanding

You need to know and understand:

- K1 why it is important to establish clients' capability and ways of doing this
- K2 why it is important to explain all options to clients and ways of doing this
- K3 the types of needs and expectations that clients may have
- K4 when it may be appropriate to provide support to help the client act for themselves
- K5 what types of initial help you can give clients
- K6 the importance of ensuring clients understand the types of ongoing support that you can offer
- K7 the relevant national, local, professional and organisational requirements relating to:
 - K7.1 equal opportunities
 - K7.2 discrimination
 - K7.3 health and safety
 - K7.4 security
 - K7.5 confidentiality
 - K7.6 data protection
 - K7.7 conflicts of interest
- K1 the importance of complying with national, local, professional and organisational requirements
- K8 organisational systems and procedures for recording clients' details
- K9 why it is important to agree the organisation's and clients' responsibility and how to do this
- K10 the types of information and support clients may need, and:
 - K10.1 where to access
- K11 how to enable clients to access information
- K12 the types of requirements that others involved with the case may have and how to help clients to meet them
- K13 how to help clients acquire the types of skills they will need to enable them to present, ask and answer questions
- K14 the types of support that you are able to offer clients
- K15 ways of reviewing progress against agreed criteria
- K16 issues that can occur in progressing actions and how to address them

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K17 how to decide when action has reached a conclusion and ways of working with clients to help them understand this

K18 when it is appropriate to end the support and ways of doing this

K19 organisational systems and procedures for recording referrals and why it is important to follow them

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Additional Information

Skills

The skills you will need to enable you to deliver the service effectively are:

- 1 questioning
- 2 active listening
- 3 providing information
- 4 negotiating
- 5 summarising
- 6 reviewing/reflecting
- 7 challenging
- 8 time management
- 9 recording and storing information
- 10 providing feedback
- 11 decision making

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