

# Support personal planning to enhance individual lifestyles with a person with a disability

Trainee assessment portfolio

23371 V1 Level 3 Credits 4

Trainee name \_\_\_\_\_

NZQA number

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## Important information for trainees

People assessed as competent in this unit standard are able to:

- Prepare for personal planning with a person with a disability, to enhance individual lifestyle.
- Participate in the planning process with a person with a disability, to enhance individual lifestyle.
- Participate in the implementation of the plan with a person with a disability, to enhance individual lifestyle.
- Participate in the evaluation of the plan with a person with a disability, to enhance individual lifestyle.

## Special notes

- 1 The performance of all elements of this unit standard must comply with any relevant cultural or legislative requirements including the rights and responsibilities of people receiving services or supports as outlined in the Health and Disability Commissioner (The Code of Health and Disability Services Consumers' Rights) Regulation 1996.
- 2 In this sector, support given to a person should be given in a manner that maximises the independence of that person. Support must be appropriate to the needs of the person and utilise existing strengths and, wherever possible, optimise the use of the local community. Performance of the elements of this unit standard must fit within these broad parameters.
- 3 Personal planning is a process that includes the following principles: that the person with a disability has an effective voice throughout the planning process; that the person's preferred method of communication is acknowledged throughout the process; that the person is consulted throughout each stage of the process; that the process itself is respectful of the person's cultural identity; that the goals focus on community inclusion; and that the person's wishes and aspirations are paramount.

- 4 This unit standard cannot be assessed against in a simulated environment. It is required that people seeking credit for this unit standard demonstrate competence and be assessed in the workplace: through paid or unpaid employment, or in placements in a service provider workplace negotiated by an education provider.
- 5 An ability to integrate theory with practice in the workplace must be demonstrated. This will call for a variety of modes of assessment and forms of evidence to show consistency of performance across a range of situations.
- 6 Definition
  - a Organisation's policies and procedures are the policies and procedures of the employing organisation of the employee and include ethical codes, standards and the requirements of any other organisations involved.

## References

- Careerforce workbook – 23371 V1 Support personal planning to enhance individual lifestyles with a person with a disability.
- Organisation's policies and procedures.

## This trainee assessment portfolio contains

- Important information.
- Workplace assessment.
- Feedback form.
- Assessment record sheet.

## Instructions

- Attach all written material to this trainee assessment portfolio.
- In some situations it may not be possible to carry out the practical application(s) required for observations. If that is the case, you are required to produce a written response.
- Read through the checklists for the assessment tasks; if you can confidently answer the questions then you are ready to be assessed.
- Your performance of the activities needs to be completed in a manner that shows the assessor that you have a full understanding of all that is involved.
- Please give this trainee assessment portfolio to your assessor so feedback and comments can be provided.
- On completion the results will be processed and sent to Careerforce for registering on the National Qualifications Framework.
- Should you require assistance with any aspect of the assessment, please discuss this with your assessor.

## Assessment requirements

- 1 **This unit standard cannot be assessed against in a simulated environment.** You will need to identify a person who you support and seek that person's permission to be involved in assisting you with this assessment. This approach should be in accordance with any organisational policies and/or procedures that apply.
- 2 You will need to include sufficient detail about the activities you undertake so that your assessor can be confident that you have developed the appropriate skills and knowledge to be able to repeat the same processes with another person who you support.
- 3 It is important that you not only report on what you did but also support your statements with copies of the information you have gathered and recorded for the development of the plan. Such information may not always be available for privacy reasons, but wherever possible you should include any supporting evidence. When including supporting evidence it is important to ask the person's prior permission to be involved; and to maintain the person's privacy and confidentiality by removing his/her name from any documentation. Please refer to your organisation's policies and procedures.
- 4 On some occasions, it may be possible for your supervisor or manager to write an attestation confirming that you have completed or referred to specific documents associated with the task you have performed. A sample attestation is provided on the next page.

## Overview of assessment

Activity	Description	Unit Standard
Workplace Assessment Task One (Beige)	<p>Supporting personal planning to enhance individual lifestyle with a person with a disability, covering:</p> <ul style="list-style-type: none"> <li>• Preparation for planning.</li> <li>• Participation in the planning.</li> <li>• Participation in implementation of the plan.</li> <li>• Evaluation of the plan.</li> </ul> <p>Assessor Attestation at end of this assessment portfolio is to be completed and signed.</p>	<p>Element 1</p> <p>Element 2</p> <p>Element 3</p> <p>Element 4</p>

## Sample Attestation

I confirm that \_\_\_\_\_ (name of trainee)

undertaking assessment \_\_\_\_\_ has been involved with/completed/  
referred to the organisation's policies and procedures for (include a detailed description):

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Name of person completing this attestation \_\_\_\_\_ Position \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Workplace assessment tasks

Task One – Supporting personal planning to enhance individual lifestyle for a person with a disability.

- Preparation for planning.
- Participation in the planning.
- Participation in implementation of the plan.
- Evaluation of the plan.

### Permission

Please arrange to have the following permission completed:

I have given my permission for \_\_\_\_\_ (trainee undertaking this assessment)  
to work with me to support a personal plan that will enhance my lifestyle.

The intention and processes involved in planning for the personal plan have been explained to me to my understanding and satisfaction.

I understand that the intention is to consider my personal goals, wishes, aspirations and ability to achieve an outcome that will assist in maximising my independence and enhancing my lifestyle.

In a situation where the supported person is unable to sign this permission, it is acceptable that, within the requirements of the organisation's policies and procedures, a family/whānau member or welfare guardian assumes the authority to give permission.

Name of person being supported \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## 1 Preparation for planning (1.1, 1.2, 1.3, 1.4)

You are required to provide detail that addresses all of the following issues. These issues are stated as questions that you will need to consider as you prepare for the planning process. Your responses are to be written in a way that has meaning for you and is clear for your assessor.

You are required to determine the level of involvement that you have in the personal planning process. To achieve the expected outcome of this unit standard you must participate in the personal planning process, but the level of your participation will depend on the wishes, abilities and needs of the person with a disability; the nature of the plan; and the level of support required.

What are the personal goals for enhancement of lifestyle of the person with a disability who you are supporting?

What are the person's wishes and aspirations for enhancement of his/her lifestyle?

What are the person's current abilities and strengths that can be used to promote independence and enhancement of lifestyle?

Are there any barriers to achieving the person's personal goals, wishes and aspirations?

Are there any barriers for the person in the planning process?

How did you record the person's goals, wishes, aspirations and abilities?

What is your role and function and your level of involvement in the planning process?

What are the requirements for the planning process within your organisation's policies and procedures?

What issues, if any, does the person with a disability who you are supporting have in communicating with you and others?

Who are the other people involved in the planning process?

What is the role for each of those people in the planning process?

**Based on all of the above considerations,** what level of involvement in the planning process did you have and how did it meet the goals, aspirations and wishes of the person with a disability who you are supporting?

What was your role in the planning process and what did you do?

What are your organisation's policies and procedures around planning to enhance individual lifestyles?

What interpersonal skills did you use with the person with a disability to establish rapport in the planning process?

## 2 Participation in the planning (2.1, 2.2, 2.3, 2.4, 2.5)

You are required to provide detail that addresses all of the following issues. Your responses are to be written in a way that has meaning for you and is clear for your assessor.

The personal plan to enhance the person's lifestyle should cover three of the following situations/ contexts. If some of these situations/contexts are not applicable to the person with a disability who you are supporting, you may choose different situations/contexts. Choose three of these situations/ contexts and answer the questions that follow.

- Physical
- Vocational
- Educational
- Social
- Cultural
- Spiritual
- Other

What support did you give to enable the person to identify, describe and prioritise his/her personal goals, wishes, aspirations and abilities?

What support networks have you identified that could support the person to meet his/her identified goals, wishes, aspirations and abilities, and are available to the person?

How did you, and any others involved, follow the principles of personal planning, namely: that the person with a disability has an effective voice throughout the planning process; that the person's preferred method of communication is acknowledged throughout the process; that the person is consulted throughout each stage of the process; that the process itself is respectful of the person's cultural identity; that the goals focus on community inclusion; and that the person's wishes and aspirations are paramount?

How do you support the person so that the plan is acceptable to the person; is person centred; and is person owned?

How is it intended to make the plan accessible to all who are involved in the implementation of that plan?

You must provide a copy of the plan to the assessor and provide evidence that the person with a disability approved the plan and had control of the process.

### 3 Participation in implementation of the plan (3.1, 3.2, 3.3, 3.4)

You are required to provide detail that addresses all of the following issues. Your responses are to be written in a way that has meaning for you and is clear for your assessor.

You are required to determine the level of involvement that you will have or have had in the implementation of a plan with a person with a disability who you support, to enhance that person's lifestyle. Please answer the following questions.

How would you describe your level of involvement in the implementation of the plan in terms of the following questions?

- What was the level of support needed by the person with a disability who you are supporting?
- How did your involvement in implementing the plan support the goals, wishes, aspirations and abilities of the person with a disability who you are supporting?
- What was your role and function as a support worker in implementing the plan?
- Was your level of involvement consistent with your organisation's policies and procedures?
- Did your involvement in implementing the plan meet the requirements of the principles of personal planning?

#### 4 Evaluation of the plan (4.1, 4.2, 4.3, 4.4, 4.5, 4.6)

You are required to provide detail that addresses all of the following issues. Your responses are to be written in a way that has meaning for you and is clear for your assessor. Please answer the following questions.

How were the actual outcomes and the desired outcomes evaluated and reviewed during the evaluation of the plan to enhance the lifestyle of the person with a disability who you are supporting, in terms of the following questions?

- How would you describe your involvement in the evaluation of the plan?
- Did the plan meet the needs of the person being supported?
- What goals, aspirations and wishes of the person being supported were achieved?
- What goals, aspirations and wishes of the person being supported were not achieved, and why not?
- What changes to the plan, if any, needed to be made?
- How did you decide on any changes needed?

- What level of involvement did the person you are supporting have in reviewing, evaluating and making changes to the plan?
- How was the person being supported – or his/her advocate – able to contribute to the evaluation?
- Who had the responsibility for ensuring changes, if any, were implemented?
- How did your role in evaluating the plan meet the requirements of the principles of personal planning?
- How did your role in evaluating the plan meet the requirements of your organisation's policies and procedures around personal planning?
- How did you know the plan met the approval of the person with a disability who you are supporting?

## Assessor Attestation

I confirm that \_\_\_\_\_ (name of trainee)

undertaking assessment \_\_\_\_\_ has:

- a been involved with the preparation for planning  (Please tick applicable task[s])
- b participated in planning
- c participated in implementing the plan
- d participated in evaluating the plan

with a person with a disability to enhance individual lifestyle.

(Provide a detailed description of the task(s) below):

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Name of person completing this attestation \_\_\_\_\_ Position \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Assessor confirmation form

I confirm that \_\_\_\_\_

(the trainee) has completed all the requirements for

Task One – Supporting personal planning to enhance individual lifestyle for a person with a disability.

Assessor Name	Assessor Number
Signature	Date



# 23371 V1 – Support personal planning to enhance individual lifestyles with a person with a disability

Level 3 Credits 4

## Assessment record sheet

Trainee information			
Name			
Employer			
NZQA/NSI number (ROL)		Date of birth	

Trainee statement of authenticity			
I hereby state that the evidence submitted for assessment is my own work.			
Signature		Date	

Trainee performance summary (completed by assessor)			
<b>Workplace assessment task</b>			
Task One		<input type="checkbox"/> No credit	<input type="checkbox"/> Credit
Reassessment		<input type="checkbox"/> No credit	<input type="checkbox"/> Credit

Comments/feedback to trainee			

Assessment result (completed by assessor)	
I have assessed the trainee and confirm:	
<input type="checkbox"/> The requirements have been met to demonstrate competency in 23371 V1.	
<input type="checkbox"/> Further evidence is required to demonstrate competency.	
Name	Assessor number
Signed	Date

On completion of the unit standard one copy of this assessment record sheet must be given to the trainee for his/her records and another copy sent to Careerforce so the credit can be registered on the NQF.

# 23371 V1 – Support personal planning to enhance individual lifestyles with a person with a disability

## Feedback form

**Please help us to improve our trainee assessment portfolio.**

Careerforce is always keen to review its materials to improve the quality of the learning experience. You can help us by telling us what you think of this assessment portfolio and by offering suggestions on ways it can be improved.

When you have answered the questions, please send this page to:

Quality Assurance Manager  
Careerforce Ltd.  
www.cssito.org.nz  
PO Box 25 255  
Christchurch  
Fax (03) 371 9285

What I liked most about the portfolio and why?

What I liked least about the portfolio and why?

Please give your rating of the following topics by ticking the relevant yes, no, or maybe boxes.

Topics or aspects of the content of this document	Yes	Maybe	No
Assessment record sheet is useful.			
Assessment questions are easy to understand.			
The assessment portfolio is well laid out and easy to follow.			

Additional comments

Contact details (optional)

Name	Organisation
Telephone	Email

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