



Australian Government

FNSPIM511 Facilitate the setting and achievement of goals

Release: 1

FNSPIM511 Facilitate the setting and achievement of goals

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to facilitate the setting and achievement of client goals. It encompasses working closely with clients to identify their current and future support requirements in order to make progress with their goals and aspirations and enable a good life.

It applies to individuals who use specialised knowledge and apply well developed communication skills and strategies to complex and sensitive situations. They work independently and collaboratively in teams and make considered decisions using organisational guidelines and tools.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the FNS Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Personal injury management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Prepare for client meeting	1.1 Obtain and analyse information about the client to inform the initial goal setting and planning meeting with the client 1.2 Use organisational tools to guide the assessment of the client information and their needs 1.3 Evaluate client support requirements and determine appropriate setting for conducting the planning meeting 1.4 Prepare client for the meeting and contact to arrange meeting

ELEMENT	PERFORMANCE CRITERIA
	according to organisational procedures
2. Conduct goal setting and planning conversation	2.1 Explain the purpose and desired outcomes of the goal setting and planning meeting using appropriate approaches for working with clients 2.2 Assist clients to identify their goals, aspirations, current life circumstances and desired supports 2.3 Provide information and assistance as required during the meeting 2.4 Document agreed outcome focused goals and supports in an appropriate format for the client
3. Prepare and finalise client plan	3.1 Review all available information to identify level and type of supports required by the client 3.2 Determine if a specialist needs assessment is required and make the request according to organisational criteria and procedures 3.3 Explore options for implementing and managing the plan according to client choice and control principles 3.4 Assess actual and potential risks and safeguards relating to the plan in consultation with the client 3.5 Determine and obtain client agreement on a plan that outlines supports, funds and management arrangements 3.6 Document the rationale for the plan and ensure sufficient, relevant evidence is provided according to organisational procedures 3.7 Communicate the final approved plan and rationale for decisions to the client using the most appropriate language, terms and modes of communication
4. Follow review and appeal procedures	4.1 Consider any requests for a review of decisions in accordance with clients' rights 4.2 Assist clients with information about review and appeal processes as required 4.3 Make changes to the original decision where appropriate within delegated authority and according to organisational procedures
5. Monitor and review client plans	5.1 Monitor plan implementation including allocated funding if relevant according to organisational policies and procedures 5.2 Conduct a review of the plan in conjunction with the client by the specified review date or where requested by the client 5.3 Revise or create a new plan if required in conjunction with the

ELEMENT	PERFORMANCE CRITERIA
	client in accordance with organisational policies and procedures

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description
Reading	1.1-1.3, 3.1, 3.2, 4.1, 5.1-5.3	Gathers and comprehends complex information to develop comprehensive knowledge and determine requirements
Writing	1.4, 2.4, 3.6, 3.7, 5.3	- Completes documentation accurately following organisational procedures - Uses clear language and terminology to convey and clarify information appropriate to the audience
Oral Communication	2.1-2.4, 3.2-3.5, 3.7, 4.2, 5.2,	- Participates in verbal exchanges using appropriate language and communication aids if required - Uses active listening and questioning skills appropriate to the audience to convey information and confirm understanding
Numeracy	3.5, 5.1, 5.2	Interprets and uses data including financial information related to work activities
Navigate the world of work	3.2, 3.3, 4.1, 4.3, 5.1, 5.3	Recognises and follows relevant legislative requirements and organisational policies and procedures and meets expectations associated with own role
Interact with others	2.1-2.4, 3.2-3.5, 3.7, 4.2, 5.2	Uses person centred and strength based communication strategies to build effective communication and rapport
Get the work done	1.1-1.3, 3.1-3.5, 4.3, 5.1-5.3	- Organises work according to defined requirements sequencing tasks to achieve efficient outcomes - Takes responsibility for decisions made using organisational frameworks and

		criteria • Uses the main features and functions of digital tools to complete work tasks
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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSPIM511 Facilitate the setting and achievement of goals	Not applicable	New unit	No equivalent unit

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>