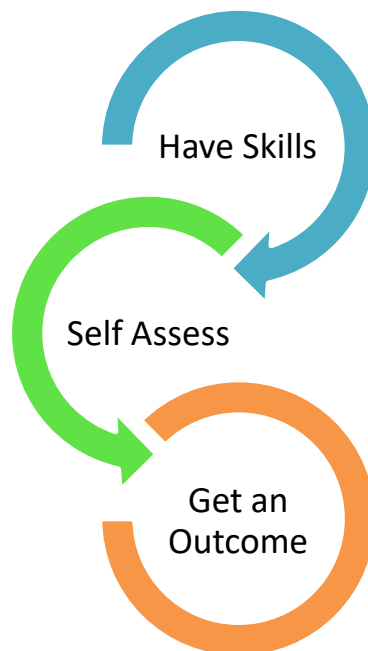


Diploma of Financial Counselling - CHC51122
Skills Recognition Application
&
Self-assessment Kit



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Introduction

Self-assessment Skills Recognition Tool Kit

This self-assessment tool kit has been developed by ICAN Learn an arm of the Indigenous Consumer Assistance Network (ICAN) to assist potential students undertake a self-assessment before requesting Recognition of Prior Learning.

Activities carried out as part of a Skills Recognition process remain confidential between the candidate and ICAN Learn.

A candidate can only participate in the Skills Recognition process after formal enrolment in the ICAN Learn Diploma of Financial Counselling. ICAN Learn does not provide skills recognition material nor resources until the candidate is enrolled.

This Tool Kit is specific to the Diploma of Financial Counselling - CHC51122

Financial counselling is a specialist service, assisting people faced with debt and other financial issues. This work requires:

- Specialist paralegal skills and competencies related to a broad variety of areas including credit and debt management, legal remedies for financial difficulty and hardship across a range of areas including social security and income entitlements, banking, taxation, debt or harassment, bankruptcy and many other areas including consumer rights. This work requires a solid understanding of the ethics and principles of social justice.
- Solid understanding of social and systemic issues that impact people's ability to manage situations of difficulty and hardship and ability to use the legal context for consumer advocacy.

What is Skills Recognition?

Skills Recognition is the general term given to a formal assessment process that measures the candidate's skills and knowledge from previous study, training, work, or life experiences against the outcomes of the course in which they require a qualification. The 3 categories in which skills can be recognised are:

- **Recognition of Prior Learning (RPL)**

This is a process which acknowledges that people learn in many ways and that learning may have been obtained through formal learning, non-formal or informal learning or a combination of all. The candidate's skills, training and experiences are assessed against the requirements of the qualification they require.

- **Recognition of Current Competence (RCC)**

This is a process through which the candidate may need to be re-assessed against a qualification they already have, to make sure that their competence is current. This is particularly relevant for licensing authorities.

- **Credit Transfer**

If the candidate has completed accredited or formal training previously or at another registered training organisation, ICAN Learn will recognise the units of study and associated competence, giving the candidate a credit transfer for the same units in the qualification they apply for. The unit codes must be identical to those in the course the student enrolls in to be granted CT.

This toolkit focuses on self-assessment across these areas.

What is Competence?

Competence is the demonstration of skills and knowledge that the candidate has gained through life and work experiences as well as any training they have successfully completed **that can be matched against a set of industry performance standards** referred to as **units of competency**. These units are grouped together to form a specific industry qualification. In this toolkit we have grouped related units into clusters.

Qualification Requirements

The Diploma of Financial Counselling CHC51122 comprises 13 core and 4 elective units; the latter 4 are selected by ICAN Learn. These elective units are selected on the basis of consultation with the financial counselling sector and meet specialist skill needs for financial counselling practice. ICAN Learn can only provide skills recognition for elective units for which it has assessment expertise.

Undertaking the self-assessment

1. **Read the Information** pages which will provide information and guidance on the Skills Recognition process, assessment & evidence requirements.
2. **Answer all questions** in this self-assessment. If a unit is not relevant, please enter- '**not applicable**'
3. **Gather any evidence** that will verify your skills, knowledge, and experience. Be prepared to upload this evidence into the Catapult electronic portal once approved.
4. **Ensure evidence is valid:** this means that all student qualification records must be verified, and any other evidence must be presented in original format and verified. Letters from third parties must be on original letter head with legitimate email signatures¹.
5. **Submit the self-assessment** to ICAN Learn administration via email administration@icanlearn.edu.au .
6. The ICAN Learn Skills Recognition assessor will contact you within 7 days after submission if more information is required.
7. You will have **7 days** to provide any additional evidence if requested. If evidence is not provided within the timeframe, the application is declined.
8. You will have **30 days** to complete the Skills Recognition Application and Kit.
9. You will be contacted by ICAN Learn about your skills recognition application outcome **within 30 days of submitting your full application.**

Confidentiality

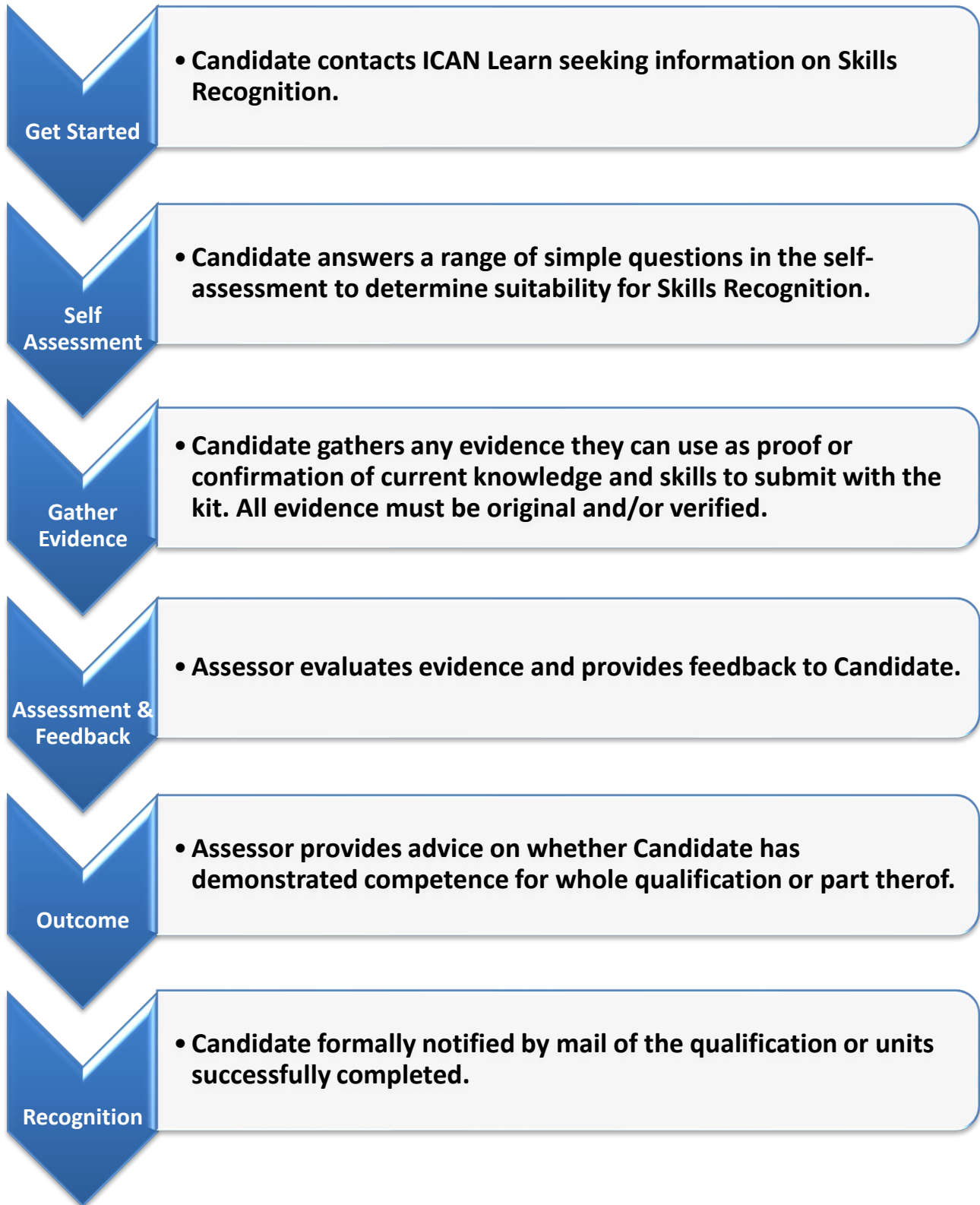
The candidate may need authorisation from their supervisor to use client files or other evidence, so it is always best to check the privacy and confidentiality policies of the organisation before using their information.

Client names and identifying factors or other personal details should be blacked out and made unidentifiable.

ICAN Learn maintains the candidate's confidentiality at all times and will not disclose Skills Recognition information to any other party. Disclosure of Skills Recognition information can only be done by the candidate themselves.

¹ Skills Recognition Policy and Procedure

The Skills Recognition Process - at a glance



Overview of the Skills Recognition Process

Get Started

Once enrolled with ICAN Learn the candidate contacts ICAN Learn and requests Skills Recognition, the student is provided with information and advice including:

- explanation of the skills recognition process and candidate requirements.
- qualification overview and time frame for submitting evidence and skills recognition completion
- cost for Skills Recognition is the same as for the relevant classroom delivered unit (Tuition fees schedule)

Self-Assessment

Complete this self-assessment **in full**.

Gather Evidence

Gather information for yourself that you can produce to verify your skills, knowledge, and experience. Evidence can take many forms, including:

- samples, photos, CDs or DVDs of your work
- letters of validation from your employer and/or clients on organisational letterhead
- a practical on-the-job assessment evidence
- your performance management reports
- **verified** certificates, qualifications etc. from previous study
- copies of documents you have completed at work – de-identified
- portfolio of workplace documents, e.g. policies and procedures that you work with.
- a simulation of a work activity

There are several broad approaches that an assessor can consider in applying a recognition process. These are:

- Real work / real time activities, including direct observation and third-party reports.
- Questioning, including oral and written.
- Portfolios that include collections of evidence compiled by candidates.
- Resume (current).

Intention to progress

Completion of this self-assessment is the beginning of the Skills Recognition process.

Submit the completed self-assessment as a **PDF** document by email to administration@icanlearn.edu.au

By submitting this self-assessment toolkit, **the candidate commits to providing evidence that is sufficient, reliable, and accurate.**

Please note: Skills Recognition is a time limited process. The student must act to submit this kit and their evidence within 30 days of making their intention known. If the Assessor requires more information this is made known to the student within 7 days. The student must provide this evidence within the timeframe or the application is declined.

Candidate mandatory questions

Read each question below and tick 'yes' or 'no' / 'not applicable' for each unit you are applying for skills recognition for.

Note: All relevant questions must have a response - Skills Recognition will not progress without completion of all relevant questions below.

You must provide the evidence list at the end of this self-assessment and the actual evidence with this submission.

Unit Code	Unit Title	Consider whether you have evidence that you have provided before ticking 'yes'	I have provided this evidence with this kit
CHCADV001	Facilitate the interests and rights of clients	I have a qualification that has this advocacy unit with the same code	
		I have a qualification that has similar advocacy units in it	
		I have provided evidence that my work requires me to undertake client advocacy regularly <i>(e.g. position description and letter of employment/ resume)</i>	
		I have provided evidence that I have acted as an advocate for consumers in a previous job <i>(e.g. resume/ third party report)</i>	
		I have provided evidence that I understand and support the principles of social justice and human rights	
		I have provided evidence I have extensive community services experience and can demonstrate purposes and links between service delivery areas	
		I have provided evidence that that I have used policy and process to advocate for a common identified client issue	
		I have provided evidence of understanding client rights including legislation that protects those rights	
		I have provided evidence that I understand the difference between a mediation process and an advocacy process and define those boundaries that apply to both roles through my work and / or previous studies	
		I have provided evidence that I can identify conflict of interest and apply this to the role of the financial counsellor	

CHCDIV001	Work with diverse people	I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I can demonstrate that I can adhere to legislation, documented guidelines, policies, and procedures e.g. Duty of Care, Confidentiality, Access, and Equity etc.	
		I have provided evidence I understand the Privacy Act; Human Rights etc. and respect the rights of others	
		I have provided evidence that I have dealt with breaches of rights and can work with appropriate personnel to solve these challenges	
		I have provided evidence that I address conflicts of interest – e.g., in areas such as translation and interpretation services	
		I have provided evidence that my work practice includes examining and understanding my personal values	
CHCCDE018	Develop and implement community programs	I have provided evidence that I have undertaken study in community development and have completed a unit with a similar or same unit code or have undertaken studies at Diploma level or above in this area.	
		I have provided evidence that I have started, built, developed, delivered, and evaluated a community project	
		I have provided evidence that my work included ways of working with appropriate and relevant stakeholders to develop and promote a community project	
		I have evidence that I had to seek financial support for a community program and worked out budgets and ways of paying for activities	
		I have provided evidence that my program was delivered by me, and I have the skills to bring information to an audience in a community setting	
		I have provided evidence that I have been involved in developing an evaluation strategy/ brief and implemented that strategy. As part of this strategy, I have had to review evaluation results	

CHCCSL001	Establish and confirm the counselling relationship	I have a qualification in counselling	
		I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I have undertaken units that have the same unit code as this or units that have similar codes	
		I am a social worker and have undertaken higher studies in counselling	
		I have provided evidence (through third party report(s)) that I understand the counselling process and engage with the client to establish a financial counselling relationship including: <ul style="list-style-type: none"> • Questioning skills: open, closed, simple and compound • Client observation skills • Noting and reflecting skills • Providing client feedback 	
		I have provided evidence that my financial counselling practice demonstrates that I consider the stages of interview (beginning and working to next stage) and appropriate counselling referral options and processes	
CHCCSL002	Apply specialist interpersonal and counselling interview skills	I have a qualification in counselling	
		I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I am a social worker and have undertaken higher studies in counselling	
		I have provided evidence that my practice uses an understanding of the professional limitations differentiation between therapeutic counselling and working within a counselling model of practice	
		I have provided evidence that all of the following are a part of my counselling approach active listening, reflection of content feeling, paraphrasing, validating, summarising	
		I have provided evidence that my financial counselling practice demonstrates that I consider the stages of interview (middle and working to end) and appropriate counselling referral options and processes	

CHCCSL007	Support counselling clients in decision-making processes	I have a qualification in counselling	
		I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I am a social worker and have undertaken higher studies in counselling	
		I have provided evidence that I am versed with the application of counselling approaches for clients who have cognitive issues – e.g. deafness / visual disturbances etc.	
		I have provided evidence that I understand the client centred approach to counselling practice	
CHCPRP003	Reflect on and improve own professional practice	I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I have provided evidence that I use counselling reflective practice techniques through journal entries I have provided	
		I have provided evidence that I am a member of a professional association for financial counselling and thereby understand the professional frameworks for financial counsellors <i>(This is essential to gain RPL for this unit)</i>	
CHCCCS019	Recognise and respond to crisis situations	I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I have provided evidence that I have been able to respond to a client in crisis in previous or current work	
		I have provided evidence that I can constructively respond to a client who is suicidal and / or has an exacerbation of a mental health issue / is in crisis	
		I can demonstrate that my work (current / previous) includes responsibilities to the client and colleagues in assisting a client in immediate crisis	
		I can demonstrate full understanding of the legal parameters of responding to a client in crisis	

CHCCSM012	Coordinate complex case requirements	I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I have provided evidence that I undertake a structured approach to case management in my work (current or previous) and use a case management plan to prepare for, organise and conduct case management meetings	
		I have provided evidence that my work focuses on empowerment of the client whilst maintaining privacy and confidentiality	
		I have provided evidence that I work with other professionals engaged with the client and collaborate for client outcomes	
		I have provided evidence that I communicate the outcomes of case management meetings to the client and other professionals involved in the client's care	
CHCDFV001	Recognise and respond appropriately to domestic and family violence	I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I have provided evidence of my ability to identify and respond to the needs of clients who have or were experiencing domestic and family violence.	
		I have provided evidence that I work/have worked with clients who have or were experiencing domestic and family violence and can adapt my work practices to this client group.	
		I have provided evidence that I can respond to the need for immediate intervention and support for clients who have or were experiencing domestic and family violence.	
		I have provided evidence that my previous work experience shows an understanding of the underpinning values and philosophies in responding to domestic and family violence.	

CHCSOH013	Work with people experiencing or at risk of homelessness	I have a qualification with exactly this unit (same code)	
		I have a qualification with a similar unit (not the same code)	
		I have provided evidence that I understand the structural barriers to secure housing and can work in a holistic and client centred approach to meet the needs of my clients at risk of homelessness	
		I have provided evidence that my work with clients includes an understanding of all factors that lead to structural dislocation, structures for housing support in my region and the impacts of the political landscape on housing stock and the private rental market	
		I have provided evidence of a commitment to the social justice approach for those at risk of homelessness, making housing a right not a privilege	
		I have provided evidence of my understanding of the tenancy legislation in my State / Territory; referral pathways to housing organisations and the ability to use legislation to protect and preserve the client's rights in relation to notification to vacate premises	
		I have provided evidence that I understand the government supports for rental and other aspects of housing (rental subsidies etc.)	
		I have provided evidence I have worked with protective legislations in relation to rooming houses and caravan parks so that I have provided suitable support to clients with these issues	

Candidate Information

Personal Details			
Date of completion of this kit			
Surname			
Given name/s			
Phone contact			
Email address (personal)			
Course	Diploma of Financial Counselling – CHC51122		
I am enrolled at ICAN Learn	Choose an item.		
Employment History			
I have provided my resume in a separate document			Choose an item.
I am unable to provide a resume but would like to give my work experience outline below			Choose an item.
Employer	Dates of employment	Key role	Contact

Please ensure you have signed this form on page 20 before submitting. Unsigned applications will not be processed.

Unit selection

I am applying for skills recognition for the following units:

Select **yes** or **no** for the units you want to apply for Skills Recognition. (Choose from the dropdown box)

Unit Code	Unit Title	Core/Elective	Unit Selection
CHCADV001	Facilitate the interests and rights of clients	Core	Choose an item.
CHCDIV001	Work with diverse people	Core	Choose an item.
CHCSOH013	Work with people experiencing or at risk of homelessness	Designated Elective	Choose an item.
CHCCCS019	Recognise and respond to crisis situations	Core	Choose an item.
CHCDFV001	Recognise and respond appropriately to domestic and family violence	Designated Elective	Choose an item.
CHCCSM012	Coordinate complex case requirements	Designated Elective	Choose an item.
CHCCDE018	Develop and implement community programs	Designated Elective	Choose an item.
CHCCSL001	Establish and confirm the counselling relationship	Core	Choose an item.
CHCCSL002	Apply specialist interpersonal and counselling interview skills	Core	Choose an item.
CHCCSL007	Support counselling clients in decision-making processes	Core	Choose an item.
CHCFIN006	Establish the financial counselling relationship	Core	*
CHCFIN007	Provide advice, counselling and representation to financial counselling clients	Core	*
CHCFIN008	Apply professional standards in financial counselling	Core	*
CHCFIN009	Provide financial counselling and systemic advocacy within a social justice framework	Core	*
CHCFIN010	Apply basic concepts of small business to financial counselling	Core	*
CHCLEG002	Interpret and use legal information	Core	*
CHCPRP003	Reflect on and improve own professional practice	Core	

*Persons wanting to apply for skills recognition for CHCFIN006, CHCFIN007, CHCFIN008, CHCFIN009, CHCFIN010 and CHCLEG002 are advised that these units are core to the work of financial counsellors and are generally not considered for skills recognition. These units do not exist in any other qualification, nor do they have equivalent units in other training packages.

Anyone practicing as a financial counsellor must have current membership with a relevant financial counselling peak body, which includes having or studying the Diploma of Financial Counselling in which these are core units.

CHCLEG002 will only be considered where this unit with the same code has been achieved in a previous qualification, in which case it is noted as a Credit Transfer.

Providing your evidence

Summary of evidence

Answer all the following relevant questions. **Make sure you list and provide all evidence documents.** If you are unable to answer a question select 'not applicable' from the dropdown box in each column. If you are not requesting skills recognition for a particular unit, leave questions unanswered.

Unit Code	Unit Title	I have provided a verified qualification which includes this unit	I have provided my resume and relevant position description	I have provided extra evidence of significant work experience in this area	I have provided a third-party written reference	Documents I am providing as evidence (required) (number and list below) (all qualification and reference documents must be original / verified)
CHCADV001	Facilitate the interests and rights of clients					
CHCDIV001	Work with diverse people					
CHCSOH013	Work with people experiencing or at risk of homelessness					
CHCCCS019	Recognise and respond to crisis situations					
CHCDFV001	Recognise and respond appropriately to domestic and family violence					
CHCCSM012	Coordinate complex case requirements					

CHCCDE018	Develop and implement community programs					
CHCCSL001	Establish and confirm the counselling relationship					
CHCCSL002	Apply specialist interpersonal and counselling interview skills					
CHCCSL007	Support counselling clients in decision-making processes					
CHCFIN006	Establish the financial counselling relationship					
CHCFIN007	Provide advice, counselling and representation to financial counselling clients					
CHCFIN008	Apply professional standards in financial counselling					
CHCFIN009	Provide financial counselling and systemic advocacy within a social justice framework					
CHCFIN010	Apply basic concepts of small business to financial counselling					
CHCLEG002	Interpret and use legal information					
CHCPRP003	Reflect on and improve own professional practice					

Type of evidence and document number reference

Required Documentary Evidence	Document number and unit(s) to which it relates
Third party report relating to specific competencies e.g. relevant letters from employers signed on formal letterhead	
Original verified Transcripts / qualifications	
Current resume / Curriculum Vitae	
Supplementary Evidence	
Brochures that you have created, project plans; other evidence relevant to specific units e.g. media articles, evaluation reports	
Written statement to support resume – written by the candidate to outline the experience they are wanting to evidence	
Skills Recognition conversation with the designated ICAN Learn assessor	

Next step

Sign document on page 20 and submit your completed kit and evidence to administration@icanlearn.edu.au. Please note unsigned applications will not be processed.

The ICAN Learn assessor will contact you upon receipt of the self-assessment kit and advise you of the next steps which may include:

- Advice of non-progression due to unsatisfactory answers in this self-assessment kit or
- Request for further information if it appears that skills recognition may be possible

A third-party report form is available on request for you to gather third party evidence for your application (e.g. manager or team leader/ colleague)

Record of Outcome (Assessor only)

UNIT CODE	Unit Title	Evidence collected (Assessor must be able to place a tick in <u>at least 2-3</u> boxes for each unit to ensure sufficient evidence)						Outcome
		Case file(s) provided	RPL discussion and /	Verified Qualification	Third party report (pat practice)	Additional evidence RPL conversation	Current Practice (RCC) PD and reference	
CHCADV001	Facilitate the interests and rights of clients							
CHCDIV001	Work with diverse people							
CHCSOH013	Work with people experiencing or at risk of homelessness							
CHCCCS019	Recognise and respond to crisis situations							
CHCDFV001	Recognise and respond appropriately to domestic and family violence							
CHCCSM012	Coordinate complex case requirements							
CHCCDE018	Develop and implement community programs							
CHCCSL001	Establish and confirm the counselling relationship							

CHCCSL002	Apply specialist interpersonal and counselling interview skills							
CHCCSL007	Support counselling clients in decision-making processes							
CHCFIN006	Establish the financial counselling relationship							
CHCFIN007	Provide advice, counselling and representation to financial counselling clients							
CHCFIN008	Apply professional standards in financial counselling							
CHCFIN009	Provide financial counselling and systemic advocacy within a social justice framework							
CHCFIN010	Apply basic concepts of small business to financial counselling							
CHCLEG002	Interpret and use legal information							
CHCPRP003	Reflect on and improve own professional practice							

Assessor Comments (if required)

ROLE	NAME	SIGNATURE	DATE
Assessor			
Student			

Please ensure you have signed this form before submitting. Unsigned applications will not be processed.

Skills Recognition Endorsement

Developer:

I confirm that the attached assessment questions address all necessary training package, qualification, and competency standard requirements. I further confirm that I have consulted with qualified subject matter experts for each identified skill set to ensure that the assessment questions are appropriate for their intended purpose and consistent with the principles of assessment (valid, fair, flexible, and reliable).

I confirm that the assessment questions address key graduate capabilities, which include the ability to:

- problem solve in a range of settings
- locate, critically evaluate, manage and use written, numerical and electronic information
- communicate in a variety of contexts and modes
- work both autonomously and collaboratively
- work in an environmentally, socially, and culturally responsible manner
- manage learning and career development opportunities

Developer (Full name):	Role	Date
Tracey McCurdy	Executive Officer	Reviewed 17.05.2023