

Title	Assess individual exercise preferences, barriers and goals		
Level	4	Credits	3

Purpose	People credited with this unit standard are able to: prepare for client assessment; establish rapport with client; inform client of assessment purpose and process; collect and analyse client information.
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Classification	Fitness > Fitness Assessment and Individual Fitness Instruction
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Available grade	Achieved
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Guidance Information

Competence in this unit standard requires knowledge of the requirements of the Privacy Act 1993 in relation to handling and storage of client assessment records. Facility and organisation record management practices must conform to the Act.

Outcomes and performance criteria

Outcome 1

Prepare for client assessment.

Performance criteria

1.1 Preparation of the assessment area and materials optimises client comfort, privacy, and confidence in the assessor and the assessment process.

Range must include but is not limited to – layout, cleanliness and privacy of the assessment room and environment; availability of room; format and presentation of assessment materials; availability of all required materials; applicable provisions of the Privacy Act.

1.2 The importance of thorough preparation and professional presentation of the assessor is explained.

Range assessor presentation and punctuality, assessor familiarity with documents and assessment area to be used, ability of assessor to explain assessment and assessment procedures in language the client understands.

1.3 Appropriate ways to physically interact with clients in service professions are described.

Range cultures – Pākēhā, Māori, and other specified cultural groups; individual client characteristics – age, gender, disability.

1.4 Communication barriers that can arise when interacting with clients are identified and preventative/coping strategies available to the assessor are explained.

Range barriers – verbal (language, volume, pace and pitch) non-verbal (stance, gestures, eye contact), age, gender, culture, disability, physical presentation (for example dress and appearance), behaviour; preventative/coping strategies – tone, pitch and pace of voice, language used, body language displayed, assessment room set up or adjustment, open questioning to gain understanding of client position/views/needs/interests, reflective listening and questioning to check client understanding of assessment process, assistance sought from more highly qualified and experienced personnel when required.

Outcome 2

Establish rapport and open communication with client.

Performance criteria

2.1 Introduction procedure establishes rapport with client.

Range may include but is not limited to – eye contact, use of client name, speaking clearly, handshake, open/receptive body language, acknowledgement of client comments/questions/requests, explanation of assessor role.

2.2 Interactions establish open communication with client.

Range may include but is not limited to – degree and type of physical contact and proximity; language used; body language displayed; content of discussions/interactions; tone, pace and pitch of voice; open questioning and active listening to gain insight and understanding on the client's position/views/interests; reflective listening and questioning used to ensure client drives the discussion; assistance sought from more highly qualified and experienced personnel when required.

Outcome 3

Inform client of assessment purpose and process.

Performance criteria

- 3.1 The purpose of assessing the client's preferences, goals and barriers is explained to the client.
- Range may include but is not limited to exercise adherence (e.g. previous experiences, lifestyle factors), exercise planning (e.g. days and times of training, contingency planning), exercise programming (e.g. choice of intensity, mode, duration, frequency of exercise).
- 3.2 Process followed for the gathering, storage, removal and disposal of client information are explained to client.
- Range client rights to non-participation; information gathered; accuracy of records/data, format, intended use, time retained; client rights relating to personal information including requests for disclosure, change, removal and privacy.
- 3.3 Client feedback is sought to ensure they are comfortable that their needs for privacy, security and communication have been met.
- Range questioning client to establish their overall comfort and understanding of the assessment situation, their rights, the assessment process, and to gain their consent to proceed with the assessment.

Outcome 4

Collect and analyse client information.

Performance criteria

- 4.1 Client's overall objective(s)/goal(s) are established and documented.
- Range objective(s)/goal(s) may include but is not limited to – medical intervention, body image, improved sport performance, stress relief, improved daily function, improved self-esteem, maintenance or improvement of health.
- 4.2 Client's medium-term goal(s) are prioritised, agreed and documented.
- Range questioning used is appropriate, logical and clear; goals are specific, measurable, attainable, realistic and timebound.
- 4.3 Client's exercise preferences are discussed and documented.
- Range type/mode, intensity, duration, time of day, frequency.

4.4 Barriers to client achieving their exercise goals are identified and potential solutions are discussed and documented.

Range barriers may include but are not limited to – lack of time, lack of money, other priorities, lack of effort, boredom, lack of planning and review, lack of support for change, poor results; potential solutions may include but are not limited to – changing workout duration/options, finding affordable options, positive reinforcement for exercise and effort, review of goal(s) and timeframe(s), higher frequency of contact with instructor, improving the quality of training through further instruction.

This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.

Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	20 April 2006	31 December 2020
Review	2	23 November 2017	31 December 2020

Consent and Moderation Requirements (CMR) reference	0099
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

This unit standard is expiring