**NZQA**

**Approved**

Achievement standard: 91236 Version 2

Standard title: Evaluate factors that influence people’s ability to manage change

Level: 2

Credits: 5

Resource title: Financial support systems

Resource reference: Health VP-2.2 v2

Vocational pathway: Services Industries

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| Quality assurance status | These materials have been quality assured by NZQA.  NZQA Approved number A-A-02-2015-91236-02-8181 |
| Authenticity of evidence | Assessors/educators must manage authenticity for any assessment from a public source, because learners may have access to the assessment schedule or exemplar material.  Using this assessment resource without modification may mean that learners’ work is not authentic. Assessors/ educators may need to change figures, measurements or data sources or set a different context or topic to be investigated or a different text to read or perform. |

Vocational Pathway Assessment Resource

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Learner instructions

# Introduction

This assessment activity requires you to evaluate factors that influence resilience – the ability to manage change, for a person who has experienced a life change that has had a significant effect on their personal finances.

You are going to be assessed on how comprehensively you evaluate factors that influence resilience with regards to managing change. This means you must be able to explain the personal, interpersonal and societal factors that influence a person who has experienced a significant financial change and their ability to cope with and manage change, and recommend personal, interpersonal and societal strategies that enhance their resilience for their particular situation.

The following instructions provide you with a way to structure your work so you can demonstrate what you have learnt and achieve success in this standard.

Assessor/educator note: It is expected that the assessor/educator will read the learner instructions and modify them if necessary to suit their learners.

# Task

You are training as a customer service consultant in the banking industry and in this role you will be helping customers manage their money. Your supervisor has asked you to show your understanding of how to assist clients, who face or have faced a significant change in their financial position, for example, unemployment, retirement, illness, accident, inheriting a large sum of money.

In this activity, you will interview a person who has experienced a significant (financial) life change (which can be positive or negative) as a basis to develop your evaluation.

You will evaluate comprehensively, factors that have influenced your interviewee’s ability to cope with and manage change, recommend personal, interpersonal and societal strategies that enhance their resilience for their particular situation.

You will present your evaluation in a format agreed with your assessor/educator, for example this could be a written report or presentation.

## Conduct the interview

You will interview a person who has experienced a significant (financial) change in life, with a focus on what that individual has done or learnt about building resilience as a result of that change experience. Your interview is not assessed.

To complete your interview you will need to:

* understand the concept of resilience (looking at risk and protective factors), and what the traits are to recognise resilience in an individual. See Resource A for definitions of resilience and risk and protective factors
* be familiar with the interview questions prior to the interview and practise active listening techniques to ensure it goes smoothly and you get all of the details you require. See Resource B for examples of interview questions
* select a person who has experienced a significant change in their life that you think has role modelled resilience. It is important that the person you choose is not currently experiencing any emotional distress due to an existing change
* ask if the person is willing to be interviewed and have their story of resilience told through this activity. Your interviewee must sign the agreement slip contained in Resource C
* go through the interview questions and listen to their story of resilience. Take notes as necessary, or record the conversation to ensure you get the details correct.

## Prepare and present your evaluation

Your evaluation should include:

* background information on the meaning of resilience, with the change event your interviewee clearly identified
* explanations of the personal, interpersonal and societal risk and protective factors that influenced their ability to cope with and manage the change

For each factor:

* + describe what the factor is, for example is it personal, interpersonal or societal; is it a protective or risk factor; what is the nature of it, what happened and who or what was involved
  + explain how or why the factor helped or hindered their ability to cope with and manage the change (their resilience)
  + link to the relevant determinants of health, as appropriate
* recommended strategies from a personal, interpersonal and societal perspective that have been taken or could be taken to help manage the change situation and therefore build resilience

For each strategy:

* + describe the actions involved, for example who would be involved, what would people need to do, where would they need to go, what other resources would be required
  + explain how/why the strategies will minimise the risk factors, and will develop and maintain the protective factors that have been previously discussed
* explanations of the interrelationships between the strategies, that is how are the strategies connected to each other to help people who have experienced a significant (financial) change in life manage change and build resilience?

# Resource A

## Definition of resilience and risk and protective factors

A resilient person is someone who has the ability to bounce back (or cope) after experiencing stressful life events, despite any adverse conditions they may live in.

Riskfactors increase the likelihood of difficulties in life, and poor well-being.

Protectivefactors enhance life opportunities and promote good well-being. These factors can reduce the impact of unavoidable negative events.

Common risk factors(impairing the building of resilience) include:

* having low self-esteem and poor social or coping skills
* lack of social support from family, friends, community
* poor work attendance, academic failure, and dropping out of a course
* experiencing parental conflict and divorce
* low family income and family disadvantage.

Common protective factors(helping to build resilience) include:

* having a large social support network (family, friends, people in the community)
* having optimism, aspirations, hopes and plans for the future, and faith that life has meaning
* having at least one close friend
* having at least one supportive parent who shows warmth and caring, who sets clear limits and expectations
* staying longer on a course and achieving well
* having many personal interests and hobbies that are valued and recognised by others
* having meaningful employment
* living in a safe and supportive neighbourhood
* feeling connected to the community and one’s culture
* having the skills (and opportunity to use them) for leadership, autonomy (working independently), interpersonal communication and leisure activities
* having thinking skills for problem-solving and decision-making
* being able to see things from other people’s perspectives
* having positive interactions with other people.

Source: (adapted) *The Youth Development Strategy Aotearoa*, Ministry of Youth Affairs, 2002 and *The Curriculum in Action − Making Meaning, Making a Difference*, Ministry of Education, 2004.

# Resource B

## Examples of interview questions

Tell me about the significant change experience you had in your life – what happened?

What was your life like when this change happened (how old, where were you living, family and friends support, etc.)?

What were your personal traits that influenced your ability to cope with this change? (What was it about you as an individual that made a difference?)

How did other people influence your ability to cope with this change?

What was society like at the time this change happened? What were the laws, cultural norms, etc.?

How did any of these influence your ability to cope with this change?

When this change happened, what did you do to cope? (What actions?)

What did any of your family or friends do to help you cope? (What actions?)

Can you think of any systems or support that existed within the community that helped you cope with the change? Identify them.

When you look back upon it now, what was the best thing about the change you experienced?

What is the biggest thing you’ve learnt from the experience?

If someone you knew was going to experience the same thing you did, what would you tell them to help them?

How do you think this change experience has influenced your life now?

How has the experience helped you to cope with other changes in your life?

Finish this sentence: My life is a good example of resilience because ...

# Resource C

## Interview Agreement Form

I agree to be interviewed by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (learner) for the Health assignment on role models of resilience. I understand that my story of coping with a significant life change will be used as the basis to develop an evaluation to help explain the concept of resilience to a wider audience. By agreeing to take part in this interview, I understand that this assignment will be assessed for evidence towards Health Achievement Standard 2.2: *Evaluate factors that influence people’s ability to manage change*, worth 5 NCEA Level 2 credits.

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

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Assessor/Educator guidelines

# Introduction

The following guidelines are supplied to enable assessors/educators to carry out valid and consistent assessment using this internal assessment resource.

As with all assessment resources, education providers will need to follow their own quality control processes. Assessors/educators must manage authenticity for any assessment from a public source, because learners may have access to the assessment schedule or exemplar material. Using this assessment resource without modification may mean that learners' work is not authentic. The assessor/educator may need to change figures, measurements or data sources or set a different context or topic. Assessors/educators need to consider the local context in which learning is taking place and its relevance for learners.

Assessors/educators need to be very familiar with the outcome being assessed by the achievement standard. The achievement criteria and the explanatory notes contain information, definitions, and requirements that are crucial when interpreting the standard and assessing learners against it.

# Context/setting

This activity requires learners to comprehensively evaluate factors that influence people’s ability to cope with and manage change when they have experienced a life change that has had a significant effect on their personal finances.

Care should be taken before beginning this activity, to instruct learners how to use ethical research procedures when interviewing individuals, and allowing them to remain anonymous, if they wish.

Learners will present their evaluation in a format agreed with you.

# Conditions

Learners could interview the person individually or in small groups. The interview is not assessed.

This is an open-book activity during which learners may refer to their interview, learning journal and notes.

The final evaluation will be individually assessed.

# Resource requirements

Learners will need access to interview responses and their notes/learning journal.

Learners may also need access to additional research material, for instance, internet access and/or reference books, in order to complete this assessment activity.

Suitable websites to support this activity include:

<http://www.cab.org.nz/Pages/home.aspx>

<http://www.workandincome.govt.nz/>

<http://www.familybudgeting.org.nz/>

<http://www.familyservices.govt.nz/working-with-us/programmes-services/connected-services/budget-advice-services.html>

<http://www.msd.govt.nz/what-we-can-do/seniorcitizens/entitlements/retirement-income.html>

<http://www.relationshipsaotearoa.org.nz/>

<http://www.ethnicaffairs.govt.nz/>

# Additional information

None.

# Assessment schedule: Health 91236 – Financial support systems

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| Evidence/Judgements for Achievement | Evidence/Judgements for Achievement with Merit | Evidence/Judgements for Achievement with Excellence |
| The learner evaluates factors that influence people’s ability to manage change when they have experienced a life change that has had a significant effect on their personal finances by:   * explaining risk and protective factors that contribute to the interviewee’s ability to manage the change situation * recommending a combination of personal, interpersonal and societal strategies to help maintain the protective factors and/or minimise the risk factors   For example, the learner explains:  Interpersonal protective factor*: At the time when my interviewee had the accident, he was fortunate to have an established social support network of family and friends nearby. They immediately took over the running of the business and household, organised relief staff, provided the household with meals and did housework so his partner could spend time in hospital with him. This is a protective factor because it meant immediately he did not have to worry about the business, and the physical and emotional needs of the family were also being supported and taken care of with the help provided. This meant he could focus on his immediate recovery and his partner could support him in hospital without the worry about what was going on at home and with the business.*  Personal strategy*: A personal strategy that my interviewee used to support himself and help manage the change was that he allowed other people (community, friends and family) to help and support him and he trusted them to do the right thing as far as looking after the business went. He also could ask them for further help if he needed it. This enabled him to be resilient because he could focus on his immediate recovery and knew he did not need to worry about what was going on at home.*  *The above expected learner responses are indicative only and relate to just part of what is required.* | The learner evaluates, in-depth, factors that influence people’s ability to manage change when they have experienced a life change that has had a significant effect on their personal finances by:   * explaining in detail, risk and protective factors that are clearly linked to the interviewee’s ability to manage the change situation and the effect on their resilience * recommending personal, interpersonal and societal strategies that are specific to the change situation to help maintain the protective factors and/or minimise the risk factors   For example, the learner explains:  Interpersonal protective factor: *At the time when my interviewee was hospitalised with a back injury he was fortunate to have an established social support network of family and friends nearby. Having a family member with him at the hospital after the accident meant there was someone there to support him. They could also take in what the medical staff were saying because he could have been in shock and might not remember later what he was being told. On the day of the accident his family and friends also took over the running of the business, checking to see what he had planned and rang the clients to explain what had happened. They also found someone in the community who was available to take over the business in the short term. In addition friends provided the family with meals and did housework so his partner could spend time in hospital with him. This is a protective factor that supported him and developed resilience because he was able to focus on being calm and work towards his recovery, without having to organise others to take over the business. This protective factor meant that even though my interviewee was going through a very painful and stressful situation, some of the stresses of his life (e.g. financial) were removed and taken care of by others which enabled him to be resilient.*  Personal strategy: *A personal strategy that my interviewee used to support himself and help manage the change was that he had the confidence and trust to allow other people (community, friends and family) to help and support him and he knew they would do the right thing as far as looking after the business went. This enhances the protective factor of having a large social support network. He also knew he could ask them for further help with the business if he required it as time went on. Assertively asking people to help and accepting their help when we need it means they know we are genuine in our requests and that assistance is required. This allows people who are managing change to focus on what is most important, and in this situation it was being in hospital and recovering from his injuries. This enabled him to be resilient because he did not need to worry about what was going on at home or with the business. This enabled him to be less stressed and have the belief if he worked at it, he would recover from his injuries.*  *The above expected learner responses are indicative only and relate to just part of what is required.* | The learner evaluates, comprehensively, factors that influence people’s ability to manage change when they have experienced a life change that has had a significant effect on their personal finances by:   * demonstrating critical understandings of risk and protective factors influencing the interviewee’s ability to manage change situations, and strategies for maintaining the protective factors and minimising the risk factors   Critical understanding will be shown by the learner through a relevant combination of:   * + showing a conceptually sound understanding of resilience   + showing insight into the change situation beyond the immediate evidence   + explaining how the change situation could lead to many inter-related changes   + linking the risk and protective factors to the relevant determinants of health   + explaining inter-relationships between the recommended strategies   For example, the learner explains:  Interpersonal protective factor: *At the time when my interviewee had the accident and was hospitalised with a back injury, he was fortunate to have an established social support network of family and friends nearby. Family met him at the hospital after the accident. Having a family member with him at the hospital meant there was someone there to take in what the medical staff were saying because he could have been in shock and might not remember later what he was being told. Also it meant that he was not alone and had someone else there for support, to talk to and provide comfort. In the hospital often there is a lot of waiting while they do tests, attend to injuries and complete operations. Having a family member there meant there was someone to talk to, he was not alone during that time and was able to cope with the unknown, being strong and resilient. On the day of the accident his family and friends also took over the running of the business, checking to see what he had planned to do, and rang the clients to explain what had happened. They also found someone in the community who was semi-retired that was available to take over the business in the short term − so even though there was an extra wage having to be paid, the clients were well looked after. In addition friends provided the family with meals and did housework so his partner could spend time in hospital with him. This is linked to the social determinant of health because having the constant support of family and friends during the time of the accident and the period after was a protective factor that supported him, and developed his resilience. He was able to focus on being calm and put all his energy into his recovery without having to organise others to take over the business. This reassured him that he did not need to worry about what was going on in the business, it was in safe hands, and his family were being supported at home as well. This protective factor meant that even though my interviewee was going through a very stressful situation, some of the stresses of his life were removed and taken care of, such as friends looking after his family’s physical needs (food, housework and physical comfort), his own physical needs being attended to by hospital staff and his emotional needs (not having to worry about the business, knowing that clients were looked after, there was some immediate financial security, knowing his family and friends were there to support him) which enabled him to be resilient.*  Personal strategy: *A personal strategy that my interviewee used to support himself and help manage the change after the accident was that he had the confidence and trust to allow other people (community, friends and family) to help and support him. This enhances the protective factor of having a large social support network. He also knew he could ask them for further help in the business if he required it. From the outside, running a business in a remote rural community could seem difficult. However, there are strong connections between the people, shared values of supporting each other, and inherently understanding that it is important to help each other. Both my interviewee and his partner would have come to the assistance of others in the community before, and would be able to accept help because of it. Assertively asking people to help means you are being clear in terms of what help you need. Accepting their help when needed means they know we are genuine in our requests and that assistance is required. It also means their help can be focused, rather than doing things that may not be of use for the person managing the change. This allows people who are managing change to focus on what is most important, which in this situation which was being in hospital and recovering from his injuries. This enabled him to be resilient because he did not need to worry about what was going on at home and with the business, enabling him to be less stressed and have the belief that if he worked at it, he would recover from his injuries.*  *The above expected learner responses are indicative only and relate to just part of what is required.* |

Final grades will be decided using professional judgement based on an examination of the evidence provided against the criteria in the Achievement Standard. Judgements should be holistic, rather than based on a checklist approach.