

# D437 Collect and analyse information to plan a progressive physical activity programme

## Introduction

### Summary

The collection and analysis of information is essential to plan successful physical activity programme. Consultation with clients at every stage of the planning process is vital to the programme's success. This unit is about collecting and analysing information which is necessary to enable an advanced instructor to devise a fixed term programme of physical activity sessions to address short, medium and long term goals.

It is vital that instructors:

- establish an effective rapport with their clients
- collect information about their personal goals, lifestyle, medical and exercise history, exercise preferences and fitness level using interviews and other techniques suitable to the clients
- record and analyse this information, identifying realistic and effective targets
- identify with the clients any barriers to achieving these targets
- research and identify with the clients physical activities to achieve their targets

The unit is divided into two parts. The first part (pages 2- 3) describes the two things you have to do. These are:

**D437.1 Collect and record information about clients**

**D437.2 Analyse information and agree goals with clients**

The second part (pages 4 - 5) covers the unit specific knowledge and understanding you must have. This is supplemented by core Level 3 Exercise and Fitness Knowledge Requirements outlined in a separate document.

### Target Group

This unit is for advanced fitness instructors who plan, conduct and review programmes to address short, medium and long term goals. They will normally be working without direct supervision.

### Linked Units

This unit links to D438, D439, C313, D440, and A318.

### Place in the NVQ/SVQ Framework

This unit is a core unit in the level 3 Instructing Physical Activity and Exercise NVQ/SVQ.

### Links to Key and Core Skills

*This unit will provide some evidence for the following QCA Key Skills:*

Communication 3.1a, 2.1b, 3.2, 3.3  
Application of number 2.1, 2.2  
Working with others 3.1, 3.2  
Problem solving 3.1, 3.2  
Information and communication technology 3.1, 3.2, 3.3

*and the following SQA Core Skills:*

Communication Intermediate 2  
Numeracy Intermediate 1  
Working with others Intermediate 2  
Problem solving Intermediate 2  
Using information Intermediate 2

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## D437.1

### Collect and record information about clients

#### The National Standard

##### What you must do

To meet the national standard, you must:

1. establish a rapport with your **clients**
2. decide what **information** you need to collect about your **clients**
3. collect **information** about your **clients** using approved **methods**
4. show sensitivity and empathy to your **clients** and the **information** they provide
5. record the **information** in a way that will help you analyse it
6. identify when your **clients** need referral to another professional

##### What you must cover

You must show that you have collected and checked all of the following types of:

###### a information

- 1 personal goals
- 2 lifestyle
- 3 medical history
- 4 physical activity history
- 5 physical activity preferences
- 6 attitude and motivation to participate
- 7 current fitness level
- 8 stage of readiness

relating to at least four of the following:

###### b clients

- 1 experienced
- 2 inexperienced
- 3 mixed ability
- 4 low fitness
- 5 individuals
- 6 groups

using at least two of the following:

###### c methods

- 1 interview
- 2 questionnaire
- 3 observation

However, you must also show that you have the necessary knowledge and skills to cover all the types of context listed above.

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## D437.2

### Analyse information and agree goals with clients

#### The National Standard

##### What you must do

To meet the national standard, you must:

1. analyse the **information** you collected
2. agree with your **clients** their needs, readiness to participate and readiness to change behaviour
3. encourage your **clients** to consider the advantages of them participating in a physical activity programme and any barriers
4. agree with your **clients** short, medium and long-term **goals** appropriate to their needs
5. make sure the **goals** are specific, measurable, achievable, realistic and time bound and reflect accepted good practice
6. record the agreed **goals** in a format that is clear to your **clients**, yourself and others who may be involved
7. identify and agree strategies to prevent drop out or relapse
8. identify and agree review points
9. treat confidential **information** correctly

##### What you must cover

You must show that you have agreed goals and targets for at least four of the following:

###### a clients

- 1 experienced
- 2 inexperienced
- 3 mixed ability
- 4 low fitness
- 5 individuals
- 6 groups

You must show that you have collected and checked all of the following types of:

###### b information

1. personal goals
2. lifestyle
3. medical history
4. physical activity history
5. physical activity preferences
6. attitude and motivation to participate
7. current fitness level
8. stage of readiness

agreeing at least three of the following:

###### c goals

- 1 physical
- 2 psychological
- 3 lifestyle
- 4 social
- 5 adherence

However, you must also show that you have the necessary knowledge and skills to cover all the types of context listed above.

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## What you must know and understand

*To be competent in this unit, you must know and understand core Level 3 Instructing Physical Activity and Exercise Knowledge Requirements outlined in a separate document and the following knowledge requirements*

### **D437.1 Collect and record information about clients**

- K1. Why it is important to collect accurate information about your clients
- K2. How to decide what information to collect
- K3. Safe and appropriate methods you can use to collect psychological, medical, lifestyle, physical information
- K4. The legal and ethical implications of collecting information
- K5. How to establish rapport with your clients and the communication skills you need
- K6. The importance of showing empathy and being sensitive to clients' goals and current stage of readiness
- K7. How to administer and interpret the Physical Activity Readiness Questionnaire (PAR-Q)
- K8. Formats for recording information
- K9. The types of medical conditions that will prevent you from working with a client unless you have specialist training and qualifications: coronary heart disease; respiratory conditions; type 2 diabetes; bone and joint problems; depression; and how to identify these from the PAR-Q
- K10. When you should refer clients to another professional and the procedures you should follow
- K11. The importance of safeguarding the confidentiality of collected information and how to do so
- K12. The strengths and weaknesses of the various methods of collecting information for different types of clients
- K13. How to make sure you have the informed consent of clients before you begin collecting information
- K14. Legal and organisational requirements for data protection and confidentiality

### **D437.2 Analyse information and agree goals with clients**

- K15. Why it is important to identify and agree goals with your clients
- K16. The importance of long-term behaviour change and how to ensure your clients understand and commit themselves to long-term change
- K17. How to organise information in a way which will help you to interpret and analyse it
- K18. How to analyse and interpret collected information so that you can identify client needs and goals
- K19. National guidelines regarding the interpretation of collected information

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- K20. The importance of encouraging your clients to reflect on the advantages of participating in a physical activity programme and any obstacles they may face
- K21. Why it is important to base goal setting on your analysis
- K22. Barriers which may prevent clients achieving their goals
- K23. Why it is important to identify and agree short, medium and long term goals with your clients and ensure that these take account of barriers and discrepancies, including client fears and reservations about physical activity
- K24. When you should involve others, apart from your clients, in goal setting
- K25. How to develop, agree and record goals which are physical, psychological, lifestyle related, socially related, adherence related
- K26. How to make goals are specific, measurable, achievable, realistic and time bound and why this is important
- K27. Strategies which can prevent drop out or relapse