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| **Appendix 1: Candidate Learning Record – Level 5 Diploma in Psychotherapeutic Counselling (PC-L5)** |

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| Instruction: Print out (or otherwise detach) this Candidate Learning Record and the [Completion Statement](#Completion_statement) which follows it. Then insert both of them in the front of your portfolio. |

Please confirm that your portfolio contains the following items (which are required in order to complete the qualification) by ticking each box below:

 A client record (60 hours minimum)

 Clinical supervision record

 1 supervisor report

 A personal counselling record (10 hours minimum during course, 40 hours total)

When you have completed your Candidate Learning Record (CLR), please tick the following box to confirm that you have inserted – **in the CLR as a whole**– cross-references to all three types of coursework (i.e. documents, tutor observation and testimony): 

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| PC-L5 |  |  |
| LEARNING OUTCOME: | 1. Work safely, legally and ethically as an independent counsellor |  |
| Assessment criteria | Candidate guidance to criteria | Portfolio references |
| * 1. Reflect on issues relating to establishing and managing an independent practice   Independent Practice Assignment  Tutor Witness Statement  Learning Journal | Choose one of these: -   * Consider a range of practical aspects including premises, advertising/marketing, insurance, costs/fees, processes for client contact/appointments, record keeping and related systems. * Show that you understand how independent practice differs from agency practice. * Reflect on the exercise/discussion you had in a small group on what is needed for you to set up an independent practice. |  |
| * 1. Work within an ethical, legal, and professional framework for independent counselling work   Tutor Witness Statement  Independent Practice Assignment  Supervisors Report  Learning Journal | You must write about each of these three points to meet the criteria.   * You must name and give examples of how you will work ethically, for example explain how you might refer a client to another service if you reach the limit of your proficiency and abide to an ethical framework. * You must name and give examples of how you will work legally, for example show awareness of relevant legislation, such as GDPR, in all aspects of client work including respect for human rights. * You must give examples of how your practice will meet professional standards |  |
| * 1. Respond to and manage ethical dilemmas   Learning Journal | You must: -   * Provide examples of how you used an ethical framework to resolve ethical dilemmas, naming the features of it that you used and explain what you did to resolve/respond to the ethical dilemmas we looked at or one from your own practice. |  |
| * 1. Research and access appropriate sources of support   Tutor Witness Statement  Learning Journal  Independent Practice Assignment | Choose either of these: -   * Write about the different kinds of support you will need in your independent practice, for example, supervision, personal therapy, bookkeeping, professional networks, peer groups, business support. * Give examples of when you have accessed appropriate support in independent counselling work, **other than just taking something to supervision or therapy.** |  |
| LEARNING OUTCOME: | 2. Work with complex aspects of the counselling relationship |  |
| Assessment criteria | Candidate guidance to criteria | Portfolio references |
| 2.1 Manage the conflicts and demands of working within relational boundaries in independent practice  Learning Journal  Independent Practice Assignment | Choose either of these: -   * Write about the kinds of difficulties you have or might encounter in managing the boundaries of the counselling relationship in independent practice, for example working with a client who has been referred by another client or working from home. * Give examples from practice of how you have managed boundary difficulties. |  |
| 2.2 Use theory and research to work with implicit aspects of the therapeutic relationship  Learning Journal  Client Transcript Assignment  Supervisors Report | You must: -   * Give examples of when you have used theory of relationship, for example, transference and counter-transference, projection, 5 A’s or relational depth. Name the theory and say how you used it to work with implicit processes, such as meeting unmet needs of the client. |  |
| 2.3 Work with challenges and difficulties that arise in the therapeutic relationship  Learning Journal  Client Transcript Assignment | Choose one of these: -   * Give examples from client work to illustrate how you managed both implicit and explicit influences on the therapeutic process, yours, and the clients. * Give examples of (and reflect on) how you have managed difficulties encountered in maintaining and working within the therapeutic relationship – e.g. resistance, collusion, recurring behavioural patterns, readiness etc. * How you have managed ruptures and unpredictable problems in the therapeutic relationship. |  |
| LEARNING OUTCOME: | 3. Use theory and research to work with client diversity in independent practice |  |
| Assessment criteria | Candidate guidance to criteria | Portfolio references |
| 3.1 Reflect on theory and research on diversity issues and apply insights to counselling work  Learning Journal | You must do both: -   * Write about your understanding of D’Andrea and Daniels RESPECTFUL Cube, naming it as theory and research on diversity issues. * Give an example of how you have used the model in peer work or client work. |  |
| 3.2 Reflect on diverse cultural perceptions of mental health and well-being  Learning Journal  Tutor Witness Statement | Choose one of these: -   * Write about the work we did on Prossy and compare the Ugandan view of mental health to the British one. * Describe the difference between the medical and non-medial approach to mental health and well-being. |  |
| 3.3 Work with the social, cultural, and biological factors that impact on individual clients.  Learning Journal  Tutor Witness Statement  Supervisors Report | You must write about each of these three points to meet the criteria.   * Name and describe the social and cultural (e.g. community, environmental) factors that impact on clients. * Name and describe the biological (e.g. gender, age, sexuality, physical differences) factors that impact on clients. * Give examples of each of the above from your client work showing how you have worked with them. |  |
| 3.4 Reflect on diversity issues which impact on clients accessing counselling in independent practice  Tutor Witness Statement  Learning Journal | Choose one of these: -   * Write about own independent practice provision in relation to individual client needs. * Give examples of how you have catered for the different needs of clients in your independent practice. |  |
| LEARNING OUTCOME: | 4. Use a coherent approach to respond to the needs of individual clients |  |
| Assessment criteria | Candidate guidance to Criteria | Portfolio references |
| 4.1 Use a coherent assessment strategy to assess individual clients and their needs  Tutor Witness Statement  Learning Journal  Supervisors Report | You must write about each of these three points to meet the criteria.   * Explain your use of a coherent framework for assessing clients. (e.g. what information do you collect and how do you use it) * Give an example of when you have used your assessment strategy with clients. * Explain how you assess a client’s service level and how you use theory in your assessment with an example. |  |
| 4.2 Critically reflect on different approaches to client assessment  Learning Journal | You must do both: -   * Write about the medical and non-medical approach to assessing clients, pointing out the pros and cons of each. * Give an example of a client who has a medical diagnosis (e.g., depression) and explain the impact of this on your practice. |  |
| 4.3 Evaluate choice of therapeutic interventions in relation to individual clients and their needs  Tutor Witness Statement  Learning Journal  Client Transcript Assignment | Choose one of these: -   * Write about the work you did in the supervision group on the course where you discussed an intervention you have used with a client and state what the intervention you used was and how it met the client’s needs. Say what worked well and what didn’t work so well in using this intervention. * Write about a time you have used supervision outside of the course to explore an intervention you have used with a client, remembering to explain the pros and cons of the intervention you used. |  |
| 4.4 Reflect on and evaluate the counselling work in collaboration with the client  Learning Journal | Choose one of these: -   * Explain how you have reviewed the work with a client to discuss how it is meeting their needs and state how well you think the work is meeting the needs of the client. * Explain how you have used a clinical audit tool to review the work with the client. Give examples of how you did this with a client and say how you might develop the work to ensure the needs of the client are met. |  |
| 4.5 Use research findings on client factors to inform counselling work  Learning Journal | Choose one of these: -   * Give examples of how you have applied the research from Mick Cooper to your work with a client, stating the research you refer to. * Give examples of how you have used other research to inform your work with clients, naming the research you refer to. |  |
| LEARNING OUTCOME: | 5. Work with self awareness as an independent practitioner |  |
| Assessment criteria | Candidate guidance to criteria | Portfolio references |
| 5.1 Use insights from work on implicit aspects of own self, personal history, and patterns of relating to inform counselling work  Learning Journal | You must: -   * Give examples of insights you have gained from working on yourself in personal development, CPD or personal counselling and say how the insight has enhanced and deepened your work with a client. Specifically mention the implicit, your pattern of relating and refer to your own personal history. |  |
| 5.2 Compare and contrast different theoretical perspectives on the use of self in counselling work  Learning Journal | Choose one of these: -   * Write about how you use yourself in the work with a client. You could consider how you might use empathy and congruence and compare this to the use of transference and counter transference. * Write about how your own use of self is different from how a counsellor from a different theoretical orientation might. Think about a CBT or psychodynamic counsellor compared to a humanistic one. |  |
| 5.3 Use awareness of self to work with the impact of power and authority in the counselling relationship  Supervisors report  Learning Journal  Client Transcript Assignment | You must: -   * Give an example of when you have been aware of responding to a client’s transference, for example when a client looks to you for advice, approval etc. How did you use or manage the counter-transference. |  |
| 5.4 Use research findings on therapist factors to inform client work  Learning Journal | Choose one of these: -   * Give an example of some research on therapist factors (Mick Cooper) and say how you have used it in client work. * Write about what you learned about therapist factors from Nissen-Lie or other research and say how you might use it in client work. |  |
| LEARNING OUTCOME: | 6. Use theory, research and skills within a coherent framework for independent counselling practice |  |
| Assessment criteria | Candidate guidance to criteria | Portfolio references |
| 6.1 Use theory to work with implicit aspects of client’s self, personal history and patterns of relating  Learning Journal  Client Transcript Assignment | You must do both: -   * Give an example of when you have used theory coherently such as (5A’s – Yacovelli, The Wound – Michael Soth, Stages of transference – Kohut) to reflect on and increase your understanding of the client’s self, personal history and patterns of relating at the implicit level. * Show how this theoretical understanding directly informs your understanding of the client’s issues and the therapeutic process. |  |
| 6.2 Use research findings to critically evaluate and develop own theoretical understanding  Learning Journal  Tutor Witness Statement  Client Transcript Assignment | You must do both: -   * Show evidence of reviewing research findings (Michael Soth, Mick Cooper, Daniel Stern etc) to question and deepen your understanding of counselling theory. * You must critically evaluate your own theoretical understanding. |  |
| 6.3 Integrate skills and techniques within a coherent theoretical framework  Supervisors Report  Learning Journal  Client Transcript Assignment | You must: -   * Show how your therapeutic interventions / responses are embedded and underpinned by your theoretical approach. You could consider The Connections Model, Person Centred Approach etc. |  |
| 6.4 Apply research findings to inform work with common life problems and common mental health problems  Learning Journal  Client Transcript Assignment | Choose one of these: -   * Research ways of working with common life problems such as trauma, attachment disorders, maladaptive schemas, neuroscience, etc and explain how you have used your findings in client work. * Refer to the case study on Darren and explain how you used Yacovelli’s 5A’s to work with him, his common life problem and mental health. |  |
| 6.5 Integrate concepts of psychopathology when assessing and referring clients  Learning Journal  Tutor Witness Statement | Choose one of these: -   * Explain how you would identify signs of psychopathology in your client assessment and referral process. * Explain how you have used the DSM V or theory such as Daniel Stern or Margaret Mahler in your assessment and referral process. |  |
| LEARNING OUTCOME: | 7. Monitor and maintain professional effectiveness as a counsellor in independent practice |  |
| Assessment criteria | Candidate guidance to criteria | Portfolio references |
| 7.1 Critically evaluate own use of clinical supervision  Tutor Witness Statement  Learning Journal  Supervisors Report | Choose one of these: -   * Write about your use of supervision specifically stating what type of supervisee you are or present as. * Write about what you do not take to supervision and why, mentioning the potential impact on practice. |  |
| 7.2 Implement a clinical audit tool  Tutor Witness Statement  Learning Journal | Choose one of these: -   * Explain how you have made use of a clinical audit tool (e.g., CORE) as part of your client assessment or ending process. * Explain the benefits of using a clinical audit tool for you and the client and explain how it can be used to monitor your effectiveness. |  |
| 7.3 Research and plan own programme for Continuing Professional Development  Learning Journal | You must do both: -   * Write about your own CPD needs and say what you plan to do to meet them. * You need to show that you have researched a range of ways in which you can meet your CPD needs (e.g. WAC, Reading, BACP Events, Workshops etc) |  |