

**A PERSONAL ASSISTANCE TRAINING MANUAL
FOR PEOPLE WITH DISABILITIES**

Table of Contents

Acknowledgements	3
Introduction	4
Where do I start?	5
Creating a job description	7
Recruitment	10
Advertising	10
Pre-screening	11
Interviewing	11
References	15
Hiring	17
Training	17
Supervision	18
Emergency Back-ups	19
Conflict Resolution	20
Dismissal	20

Acknowledgements

The development of this training manual has been made possible by the input of many people. I would like to thank Michael Peluso, Mary Lou Breslin and Vincent Reiter for their feedback on the contents of this manual. In an effort to create a comprehensive, yet straightforward manual, the writer has collected articles, manuals and training films from numerous journals, independent living centers, the World Institute on Disability and Independent Living Research Utilization. Some of the works have never been published and others are currently out of print. On behalf of the Troy Resource Center for Independent Living, I would like to thank all of these authors for their efforts to promote self-directed personal assistance services and enhancing the skills of people with disabilities to be effective managers of these services. In particular I would like to thank Ann Marie Tully and Patricio Figueroa, Jr. whose unpublished "Guide to Independent Living" (1978) helped to provide a framework for this manual. Additionally, I would like to thank Alfred H. DeGraff for his very comprehensive and informative book entitled "Home Health Aides: How to Manage the People Who Help You" (1988). This book, which is no longer in print, is probably the most authoritative work on the subject.

Denise A. Figueroa
April, 1996

INTRODUCTION

The purpose of this training manual is to offer a guide to persons with disabilities in managing their personal assistance services. It is not intended to answer all of the questions that a person may have, but should help to establish a framework for approaching the recruitment, hiring and training of personal assistants. Unfortunately, too often professionals and policymakers without disabilities do not believe we are capable of managing our own personal assistance services. This manual should be used as tool to ensure that you have the necessary skills to do the job. No one knows your individual needs better than you and the Troy Resource Center would not presume to know them. We do hope however that this manual can serve as a guide for you. The manual covers all of the basics from assessing your needs and preferences to the hiring process, supervision, discipline and emergency back-up planning. We hope you find it helpful and since it is a work in progress, we will be happy to receive your feedback on the scope, content and usefulness of the manual.

WHERE DO I START?

Before you begin to advertise or recruit for an attendant, you need to take a good look at yourself and decide: Who are you? What are your values? What are your needs? Make a list of your needs. This is not always as easy as it sounds. One way to do this is to take yourself through a typical day. Ask yourself:

What are my priorities?

Do I like to get up early or late?

Do I need assistance getting out of bed?

Making transfers?

Getting washed?

Getting dressed?

Do I need bladder and/or bowel care assistance?

Do I need assistance with grocery shopping?

Do I want to/like to cook or do I need/want the personal assistant to do that?

Do I need help with feeding i. e., cutting food only or feeding the food to me?

Do I need assistance with dishes, putting away food, etc?

Can I/will I do laundry? Including washing, drying, ironing, folding and putting the clothes away?

Can I/ will I dust, vacuum, wash floors, make the bed?

Do I like to be with people or do I need my quiet time?

Do I travel a lot locally, or long distances for work or pleasure?

Will I need someone to drive or travel with me?

How often do I need each of these tasks accomplished and how long does each one take?

What am I willing to trade-off, if I can't get all of these needs met?

Once you have completed this analysis, you may discover you have different needs depending on your activities. For instance, if you do a lot of traveling, you may want one attendant who will primarily travel with you, while your non-traveling routine may require another person with different skills. When you're traveling, you may want someone who is very flexible with their time, likes staying out late, can do a lot of lifting in case things aren't as accessible as you expected, is more mechanically inclined in case a wheelchair breaks down or needs repair. On the other hand, when you are home, someone who needs to work a more routine time schedule, likes to cook, and can do the shopping and cleaning, may be the better person for you.

Once you know what you need and what your preferences are, you need to determine the qualifications and qualities of the employee you are seeking.

What kind of person do I want for the job?

Based on your needs you have already defined, you may decide that there are certain qualifications that are critical. Perhaps you have a special diet or certain foods you prefer, and then you will need someone who can cook such meals. Make a list of the qualifications you believe the personal assistant must possess.

Some questions to use as a guide are:

Do I have a preference for a male or female attendant?

Do I want someone who has done this kind of work before?

What skills must they have?

- Cooking?
- Lifting?
- Driving?
- Shopping?

Given the very personal nature of the services you are seeking from a personal assistant it is very important to consider your values and interests and the applicants. Consider the personality traits and characteristics that are comfortable for you. Ask yourself, do I want some who is:

Outgoing?

Quiet?
Talkative?
Likes music?
Dependable?
Reliable?
Flexible?
Likes children?
Likes animals?

Now it is time to pull all of this information together in a job description.

Creating a Job Description

The purpose of creating a job description is to help you identify your needs and preferences. It also helps when you conduct your interviews because it serves as a guide to ensure that all of the important issues are covered. The job description you design should be precise with clear job duties defined. From the lists you have created, you can insert the information you need for the job description. If you are hiring more than one attendant, you should probably make different job descriptions based on the distinct skills you want from each personal assistant.

Components of a job description should include:

1. **Job Title** - This will probably be personal assistant or home care worker, however, if you want someone who is going to primarily serve as person who will travel with you and or drive, you may want to call this person a Personal Assistant/Driver.
2. **Nature of Work** - This should be a brief description of the job including some information on the nature of your disability, times of day needed, types of job duties. A more elaborate delineation of duties will be provided later in the description.
3. **Qualifications and Qualities of Employee** - This is where you will describe the type of person you want for the job including preference for male/female, college student, etc.
4. **Duties to be Performed** - Be very specific here. This is where you list everything you want this person to do and how often. If you need someone to empty a leg bag or irrigate a catheter, say that. If you want someone to assist you in and out of bed, into the shower, get dressed, cook breakfast and

dinner, shop, make the bed, change the sheets, do the laundry, do the dishes or load and unload a dishwasher, list it. The more specific you can be in defining the job duties, the fewer problems you will have later on with an employee whose understanding of the job may be different than your expectations.

5. **Work Schedule** - Indicate days of the week, hours of the day seeking personal assistance.
6. **Salary** - Indicate hourly wage, this is often preset based on the funding source, but if there is flexibility, indicate that here, including how often salary will be paid.

Sample Job Description

Job Title: Personal Assistant (part-time)

Nature of Work:

J.P. is a 28 year old male who works full-time. He has a spinal cord injury which has resulted in paralysis and loss of sensation below the chest. Additionally, he has limited use of his arms. J.P. functions independently during the day but will need assistance in the morning and at night.

Qualifications and Qualities of Employee:

Trained or experienced personal assistants are welcome to apply, however applicants who have no experience may apply if they have the following qualities:

- ◆ Dependable - arriving for work as scheduled.
- ◆ Punctual - arriving on time for work.
- ◆ Respectful - showing courtesy and respect to individuals regardless of disability, racial, cultural, ethnic backgrounds or religious beliefs.
- ◆ Maintains a reasonably clean and neat personal appearance.

- ◆ Never arrives to work or attempts to work while under the influence of alcohol, medications or drugs.

Duties to be Performed:

Morning:

Transferring out of bed
 Empty leg bag
 Change urinary device
 Transferring to shower chair
 Bathing
 Shaving
 Combing hair
 Getting dressed
 Prepare breakfast
 Load dishwasher
 to car/van

Evening

Prepare dinner
 Load dishwasher and run
 Put food away
 Assist with sorting mail
 Changing clothes
 Empty leg bag
 Change urinary device
 Transfer into bed
 Set-up computer or T.V.
 Make sure phone and controls are within Assist reach
 Lock -up for evening

Weekly (based on an agreed upon schedule):

Change bedding
 Vacuum, rugs in living room bedroom hallway
 Vacuum dust from couch and living room chairs
 Dust furniture
 Mop floors in kitchen & bathroom
 Clean kitchen sinks and counters, bathroom sink, tub, toilet, counters and mirror
 Do laundry
 Grocery shop
 Water plants

Occasionally, due to accidents or spills, some of these activities may have to be done more often.

Periodic (according to a prearranged schedule):

Clean oven
 Defrost kitchen freezer

Clean windows
Wash curtains or remove and take to cleaners

Work Schedule:

Hours will be from 7:00 a.m. - 8:30 a.m. M - F and 7:00 p.m. - 9: 30 p.m. M- F

Salary:

The salary is established by the funding source and will be \$7.50/hr. Salary will be paid bi-weekly upon submission and approval of time sheets. Employer is responsible for withholding state and federal tax and for contributing to FICA. Salary does not include paid vacation or sick leave.

RECRUITMENT

There are a variety of sources that you can use to find a personal assistant. These include talking to friends, relatives, co-workers, members of organizations you belong to and neighbors about people they know who are looking for work. Most people find their jobs through personal contacts so don't be afraid to let people know you are recruiting. If you are need of a personal assistant because your current one is leaving, ask your current PA.

Other sources for recruitment include college campuses, where students may be looking for part-time work, hospitals or rehabilitation centers, community bulletin boards, your local independent living center or social services office, and the Department of Labor Community Service Center. Recruitment includes advertising; most of the sources will be free including posting with the labor department, schools, churches, community organizations, social services and chambers of commerce. Whether the advertising is paid or free you will need to develop an ad.

ADVERTISING

Once again, the places to advertise are many. If you are advertising for free, your ad may be larger, depending on the requirements of the advertising source. For instance, the Department of Labor has a form which gets filled out and can detail many of the job duties. That will be then being available on their computerized database. On the other hand, your local cable station may allow you to advertise, but have a limit to the number of lines.

If you are placing an ad in the classified or on a bulletin board you want it to stand out. Try to make the description appealing by considering what might be important to the potential applicants. If it is the salary then perhaps you might want to say:

"Earn \$7.50/hr. to provide personal assistance services to person with a disability, 20 hours a week. Duties include housekeeping, cooking, assistance with bathing/dressing. Call: 555-5555 to arrange for interview."

Perhaps you might feel the part-time nature of the job is important:

"Part-time personal assistant wanted for disabled female, duties include assistance with bathing/dressing, household chores, cooking. Prefer female. Great job for student or housewife looking for extra \$\$\$. Call 555-5555."

PRE-SCREENING

Now that you have advertised, you are going to get responses. It is always best if you are prepared to do some screening of the applicants over the phone. Very often, by asking a few questions and listening carefully to the responses and attitudes conveyed, you can avoid wasting your time and the applicants with unnecessary interviews.

Develop a list of questions that will help you decide whether to interview the candidate. These questions should be based on the job description you have already developed. It is not necessary to get very detailed with the particulars of the job, but it helps to outline the job duties, days and hours you are seeking.

Some suggested questions are:

Do you have experience as a personal assistant or have you done similar work?

If so, for how long?

How do you feel about household chores?

Are there any household chores you will not do?

Can you cook?

Are you over 18?

Can you lift _____ (your weight) or do you know how to operate a hooyer lift?

Do you feel comfortable assisting me with personal care such as bathing, toileting, dressing?

Have you ever been convicted of a crime?

Are you available to work at _____? (State the hours you are seeking.)

Once you have screened the candidates, you are ready for the interview.

INTERVIEWING

Where to hold the interview

You may decide for security reasons that you would prefer not to interview the attendant in your own home. If this is the case, the independent living center can probably offer you a place to meet with your prospective employees. Other places include private reading rooms in the library, or an empty office or classroom on at your college campus. Another way to ensure some safety would be to interview the candidates in your home with a friend or family member present.

What to look for

The key to a good interview is establishing a good rapport with the candidate. Try to make the candidate feel at ease. Tell them a little bit about yourself and your interests. Be friendly and straight forward in your questions and responses. This will help the candidate to view you as a person they would want to work for and will also help you to get "real" responses from the candidate.

While interviewing, be careful to observe the non-verbal behaviors.

Did the person show up on time for the interview?

How were they dressed? Were they reasonably neat and clean?

Did they seem calm or very anxious and uncomfortable?

Did they make eye contact with you when you or she/he was speaking or did they avoid looking at you by staring at the floor or ceiling or by looking past you?

Listen to what the candidate says and how they say it?

Did the candidate ask questions?

Did the candidate answer the questions in a clear way or did they appear to avoid the questions?

What was the candidate's tone of voice? Was it pleasant and respectful or was it condescending?

Did the candidate state answers in a confident way or did they sound as if they were trying to tell you what they thought you wanted to hear?

Did the answers convey an attitude toward the job of a person who is truly interested in this job or someone who isn't sure this is what they want to do?

How did you feel?

Our gut feelings and instincts are very important to listen to when conducting an interview, particularly for a person with whom you will work so intimately. Don't be afraid to listen to your feelings.

Did this person convey a feeling that you could work with them in your home?

Do you feel you can trust them?

Do you feel comfortable asking them to do tasks that can be unpleasant?

Questions to ask

Start with some ice breaker questions like:

Did you have any trouble finding the house/apartment?

How is the weather? Is it still raining?

Provide a brief description of yourself, your disability and how it effects you, whether you work or are a student or homemaker, your living arrangements, who lives with you, you live alone, with a spouse or significant other, child(ren), pets.

Now that you have established a rapport with the applicant, you can begin to ask detailed questions such as:

What is your work history?

Have you ever been a personal assistant before or done similar work?

Where do you live, is it nearby?

Would you have any difficulty getting to work on time? In inclement weather would you have problems traveling?

What is your educational background?

What are your interests and hobbies?

Have you ever worked for or with people with disabilities before? What was that like?

Do you have friends or family members who have disabilities? What kind?

Do you like to cook?

How do you feel about household chores?

How do you feel about assisting me with toileting, changing my catheter, giving an enema, bathing, and dressing? Be very specific about your personal needs and don't use vague terms like " I need help in the bathroom and/or with getting dressed. "State what kind of help you do need, putting on shirts, sock, pants, underwear, shoes etc.

Are you allergic to any animals?

Are you allergic to any cleaning products?

Why do you want this job?

What strengths or characteristics do you bring to this job that you believe will be particularly helpful?

Are there parts of this job that you would not be willing or able to do or for which you would need further training?

What do you see yourself doing in three or four years?

It is also helpful to provide some scenarios or hypothetical questions for the candidates to respond to. These scenarios help you to learn how the candidate deals with problems or conflicts. These questions can give you an idea about attitudes, reliability, etc.

For instance you could say " Suppose you were confronted with a family emergency at the same time you were due at this job; What would you do?" Or you could say " How do you feel about assisting me with putting on a condom?"

There are not necessarily right or wrong answers for these questions, but they give you a glimpse of how a person thinks, their priorities and attitudes.

Describe to the applicant, your expectations of a personal assistant, the duties and the qualities you seek in a candidate, i.e. someone who is dependable, reliable, punctual, and respectful of you and your need for confidentiality and is willing to discuss questions or concerns before they become problems. Also indicate how much notice you would expect from a personal assistant if they planned to leave the job.

Discuss the salary that you have established for the position, vacation or sick leave procedures, frequency of pay and payday.

Ask the candidate if he/she has any questions. Try to respond thoroughly to any questions asked. Ask the applicant if they are still interested in the job.

Ask the candidates to provide at least three references, two of these should be employers. Make sure that you get a name, address and phone number, dates of employment, job title or relationship to reference, and why the candidate left the job, if it is an employment reference.

Once you have conducted the in-person interview you should let the candidate know that you will be interviewing other candidates or that you have interviewed other candidates and will be checking all of the references. Indicate when you plan to make a decision and your plans for informing the candidates.

REFERENCES

Always make sure you check the references of all serious candidates for the position.

When you call, explain who you are and that you have interviewed XYZ candidate who has given this person's name as a reference.

Ask them :

In what capacity do you know the candidate?

If it was employment, What were the approximate dates of employment?

What position did the candidate hold?

How was their work performance?

Why did they leave the position?

Explain the position you are recruiting for and ask if the reference believes this person would be a good candidate for this type of work.

If this reference is personal ask:

How long have you known _____?

Explain the position as above and ask, What characteristics about _____ do you believe best enable him/her to do this job.

Can you give me an example of a time or situation when he/she displayed these qualities?

Do you believe there are any parts of this job that the candidate would find difficult to do?

Are there any personality traits that you believe would interfere with their performance?

Thank the references for their time and assistance.

Remember to take notes when you are calling references because it helps later on in recalling each candidate's strengths and weaknesses.

Once you have checked the references for all of the candidates, you should compare them to the information you have received from the candidates. Look for any discrepancies in facts about employment. Also, reflect on the responses of the references. You can usually tell when someone feels uncomfortable about responding to a question, it may be a hesitation in response or a need to clarify that they are not sure about a situation. Certainly if a reference specifically states a reason why a candidate could not do the job, you need to consider whether the reason stated is significant and applies to the type of work you are seeking to be performed.

You should rank order your candidates into three categories:

1. Reject - candidates who you do not believe are suitable.
2. Backup file - Candidates who are qualified and appear to be desirable, but you have another more qualified applicant at this time.
3. Offer employment - this is the applicant you want to hire and will offer the job to first.

Now that you have decided who you want to hire, you can make a job offer.

HIRING

As soon as you have made your decision, you should call the desired candidate immediately. Most of the time these individuals are actively seeking employment and you wouldn't want to lose your top choice because of delays. Call the person and make the job offer and arrange for a start date. If they are not interested in the position, call the next person on your list. Try to establish a start date as soon as possible so you still have access to other candidates if things don't work out.

Once you have agreed upon a start date and your candidate has successfully begun work, you can call the other candidates to inform them of your decision. It is fine to inform your "rejection" category right away, because you have ruled out ever hiring them.

However, you will probably want to delay calling the backup candidates for a few days in case your top candidate changes their mind or doesn't work out.

TRAINING

Regardless of whether your personal assistant has had prior experience, you will

probably want to train them on specific ways to transfer you, catheter care, bladder and bowel routines, where you store your household supplies and food, where you shop, where you do laundry and any other number of issues that are unique to you.

Before beginning the training, you should have a work plan developed which lists the duties you expect of this employee, when and how often they are to be performed. This work plan will not only guide you through the training, but will serve as a guide for you and the employee during their tenure.

As you go through your routines, make sure to explain why you do certain things. It is important that employees, regardless of their job understand the purpose for doing them in a certain way. Clarity of purpose helps to avoid conflict in the future.

Sometimes it is helpful to have someone else around who can assist you in training, particularly for issues like transferring or getting dressed on the bed. This third party who may be your current PCA, a family member or friend, can demonstrate your routines while you narrate the process.

While you want to establish yourself as the employer whose direction must be followed, it is important to remember to be friendly and supportive during this process. The personal assistant will likely be nervous and eager to please as would any new employee. While you cannot allow the new personal assistant to do something the wrong way, because that will make it harder to correct later on you can address the issue directly in a non-confrontational way. It is also important to give praise when it is deserved. Praise encourages the new employee and shows them that you will recognize a job well done. On the other hand, you should never over-praise behavior because it will appear insincere and the employee may get the message that your communication cannot be trusted.

Mutual respect and trust are the cornerstones to all good relationships and it is particularly critical at this stage in your relationship that you establish that trust. Be comfortable with outlining your expectations of employee behaviors and your willingness to work out conflicts. This kind of communication up front will go along way in securing a long lasting working relationship.

SUPERVISION

A sure way to destroy a relationship is to "nit-pick" and "nag". If someone is doing a

good job, tell them and let them do it. It is not necessary to remind people constantly about routine responsibilities that they are doing well. The result of such behavior is a message that you are not happy with job performance and that probably nothing will ever make you happy.

A good supervisor serves as a coach, encouraging employees to do their best, providing constructive criticism on how to improve and being supportive. Once again, this is not to say that you let poor performance go without comment, that would be a mistake. The comments you choose to make however, will either encourage positive change or stop growth all together.

Which of these statements do you think will address the problem?

"Why can't you ever get things right; I'm tired of telling you the same things over and over again. The kitchen floor is supposed to be washed every Thursday. What's going on here!"

"Sally, I think we need to talk about the routine for cleaning the kitchen. I know we have gone over the schedule before, but I have noticed that the floors are not being washed when we agreed to. Is there something we need to change in the schedule or is there a concern you would like to talk about?"

The second statement will likely start a constructive dialogue rather than the first statement which causes resentment and defensiveness. As humans, we all get angry, but when that happens we need to take a step back, think about what our goal is and go from there. If our goal is to improve a situation or resolve a problem, than we need to make sure that our communication conveys that willingness. If we believe it is too late to resolve the problem, then no amount of yelling or accusations will change the situation.

Your role as a supervisor, is not to show someone you're the boss, or make someone feel insignificant. Remember your responsibility to be respectful of your personal assistant. If there are other people present, make sure you introduce them using their name, not their job title. Don't ask to speak with them only when something goes wrong, or when you want to tell them to do something. You are part of a relationship for which you share 50% of the responsibility.

One mistake that employers make often with personal assistants is to constantly change the tasks their employees are asked to do. If an employee never knows what they will be doing, it makes it very hard to carry out their duties. Occasional changes in schedules or unforeseen events can and do occur, but if you find that scheduling

changes and duties are changing frequently, then you may need to sit down with your employee, review the work plan and job description and revise it.

You should schedule regular sessions with your personal assistant to "check-in" and get feedback. These are great opportunities to find out how the attendant is feeling and determine any need for action.

EMERGENCY BACKUP

There will be times when due to a family emergency, illness or some other unforeseen event, your personal assistant may not be able show-up. It is critical that you have a plan for such an event. We have already discussed the benefits of dividing your personal assistant services among two or more people. These individuals can become backup employees for you. It will help in rotating vacation schedules and will prevent employee burnout.

In addition, though you should consider the event that none of these people are available. Planning ahead for such occasions, could prevent you from being placed in serious jeopardy. Consider discussing contingency plans with friends or relatives as well as your personal assistants.

Maintain a list of backups, you developed this in your recruitment process. Keep this list up to date, periodically checking to see if the individuals are still available. Your local independent living center may be a source of backup attendants as well.

Some experienced personal assistance users recommend that you:

Cultivate relationships with store owners, who might deliver groceries in an emergency. This is particularly helpful in weather emergencies where an employee may simply not be able to get to you.

Keep a list of restaurants that will deliver and develop a relationship with the delivery people. In the event no one else is in the house, they might be willing to take down a dish for you or set out the food.

If you have a good rapport with a neighbor who you trust, give them a key and if you need assistance out of bed and your personal assistant hasn't shown up, call them, or if you can't use a phone without assistance, prearrange to have them check on you if they don't hear from you by a certain time. This kind of arrangement can work well in apartment buildings where neighbors are in close proximity to you.

CONFLICT RESOLUTION

Regardless of how well you communicate with one another, there will be times when you have conflicts. Often these conflicts can be resolved by engaging in dialogue and negotiating issues. Perhaps your employee objects to combining certain chores, or doing certain chores. Through negotiation you may be able to trade-off one task for another, change schedules or even swap duties with another personal assistant. Just remember that both parties should come out of a negotiation feeling as if it was fair, and no one hurt in the process. That is not to say that people get everything they want, but they understand why they got what they did. You may find it helpful to use a neutral third party when you feel "stuck" on an issue. Your local independent living center may be able to help you identify a mediator.

Sometimes conflicts cannot be resolved satisfactorily, and both parties may decide the issues cannot be resolved. They may be personality differences or they may have resulted from poor communication for too long. No matter what the cause it is helpful to recognize when you will not resolve a problem and part amicably.

DISMISSAL

If there is no way to resolve the conflicts, then you will probably want to dismiss your employee. It is never good to try to keep an employee if they don't want to be there. Sooner or later it will cause problems for you. This is never pleasant, but there are times when both of you recognize the need to part and you may both feel relieved that you have finally taken this step.

Whenever you need to dismiss an employee, you should try to be prepared by having one of your back-up attendants available. If the situation has been very bad and you are concerned about your safety, you may wish to have someone present when you dismiss the employee. It is also highly recommended that you collect all the keys and change lock cylinders if you feel there is a danger of retribution. Always try to inform someone else when you are planning on dismissing an employee.