Partnerships for personalisation

A practical guide to successful working relationships between individual employers and their personal assistants, carers and support workers

"we help people who employ their own personal assistants"
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“Control is a two-edged sword. It leaves you in the driving seat, but also leaves you with the responsibility to drive”

Quote from a survey respondent in Personalisation and partnership (2011)
1. Introduction

The research report *Personalisation and partnership* (2011) focused on what factors disabled people feel are important in their relationships with their personal assistants, carers and support workers. One of the recommendations from the research was the need for a guide or checklist to support employers to be able to determine what is important in the qualities, skills and knowledge of a worker in order for the employers to be as independent as possible.

This guide is based on the key findings from the research report.

**Purpose of this guide**
- To enable new and existing employers to think clearly about what they are looking for from a personal assistant (PA) to enable a good working relationship.
- For potential personal assistants to have a better understanding of what qualities may be required of them to support a good working relationship.

Every individual employer will have different needs and outcomes, and will have specific values and qualities that they will look for in a personal assistant.

The guide will help you as an employer to think about:
- your definition of what a successful working partnership could or should be
- ways of working out what sort of person are you looking for
- how you want the personal assistant to be able to provide a good quality service.

Please refer to the research report *Personalisation and partnership* (2011) where there are statements from individual employers about the areas covered in this guide which may help in understanding other people’s experiences.

Skills for Care has developed a range of products to help inform and guide you through the responsibilities that you have as an employer, including the *Toolkit to support people employ their own personal assistants* to help guide you through the process of employing a personal assistant, what to do when they are working for you as well as helping you to understand your responsibilities as an employer and your legal obligations. Visit [www.skillsforcare.org.uk/employingpas](http://www.skillsforcare.org.uk/employingpas)

**Editorial note** – this guide recognises that an individual employer or family carer uses different terms to describe a person who is directly employed. The abbreviation ‘PA’ (personal assistant) is used to describe anyone who works for an individual employer or family carer. We use the term ‘individual employer’ to distinguish this model of employment from care service organisations. An individual employer employs a personal assistant themselves via the use of an individual or health budget or from their own funds or a combination. The National Minimum Data Set for Social Care (NMDS-SC) uses the term direct employer as distinct from individual employer.
2. Before employing a personal assistant

2.1 Making decisions
Some questions to consider:
- how many personal assistants do I need?
- if you need more than one personal assistant, do you want the qualities, skills and knowledge to be similar or different?
- do you need the support of a broker, support planner or direct payment support team to think through and plan recruiting?

2.2 Are having boundaries important to you?
Boundary means a line marking the limits of an area, territory, etc. Other words are limits, confines, borders, limitations, margins, restrictions.

2.3 What boundaries are important to you?
For example:
- what name you want to be called by?
- are you looking for a friend in your PA?
- are you looking for a PA that you can be friendly with, but not best friends?
- which rooms in your accommodation can the PA enter?
- how will you ensure it is clear who makes the decisions about your life?
- how much should the PA know about your financial affairs?
- how much personal data/information are you willing to share?

Things to think about
Even when you have clear ideas and thoughts about what boundaries you want in place, it may also be worthwhile to talk to other individual employers, family and friends for other ideas.

2.4 What do you expect from a personal assistant?
For example:
- to be reliable?
- to turn up on time?
- to communicate in ways that suits you?
- to be able to support you to do things, your way at your pace?
- to be able to work in isolation?
- to work under your or your family carer’s direction?
- to be motivated?
- to take into consideration your background, ethnicity, gender and sexual orientation?
- to be trustworthy in and outside of your home environment?
- to be aware of and practice the dignity principles, such as privacy and respect?
- not to use their personal mobile while working with you?
Things to think about
You may want your PA to know certain things or have particular skills to meet your support needs. For example, you may be interested in gardening and would like to have a personal assistant who is willing to learn or shares an interest in gardening.

2.5 What qualities are you looking for?
For example:
friendliness  willing to work  able to listen  respectful
be confidential  acts professionally  open minded  honest
trustworthy  sensible  flexibility  adaptable
sense of humour  able to communicate with you and others appropriately
willing to work in different ways  able to work as part of a team

Things to think about
How will you be able to test the qualities? For example, from references, application form, interview, test, recommendations from others.

2.6 What type of relationship do you want?
1) My PA is my friend and we regularly go out.
2) I am friendly with my PA but I never go out with them when they are not working.
3) I am not friends with my PA, but am friendly when talking.

Things to think about
Relationships between people develop over time. In a working relationship, it is important that both employer and employee are clear about what is expected from each other and that this is talked about regularly.
3. Interviewing potential personal assistants

As an employer you can make choices about how to interview potential PAs: how formal or informal; place and time; the type of questions and/or activities you want to take place at the interview or meeting. Record how you feel about the person (first impressions) and how they performed during the interview. This is for your records and in case the person requires feedback.

3.1 Interview questions

Here are some examples of questions you can ask:
- what experience have they had working with people and can they give an example?
- what are their interests?
- what do they know about specific disability/health conditions?
- what training have they had?
- what qualities do they think they need or already have to work with you?
- are they willing to learn different ways of working?
- why do they want the job?

Things to think about

There will be questions that are important for you to ask, which may be related to your lifestyle, your expectations and their personality. The Toolkit to support people employ their own personal assistants gives guidance on effective ways of recruiting and keeping workers.
The first few sessions will involve explaining what your needs are and how you intend to work together. This will give you an insight into values, attitudes, understanding of lifestyles and expectations. It will help you to know (or find out) if your PA needs to do some training or learn new skills.

4.1 What do I need to know about gaps in the PAs knowledge and skills?

For example:
- legislation
- human rights, social care values
- health conditions
- your culture, lifestyle.

**Things to think about**
Every personal assistant will have different skills and knowledge but will also need development to be able to support you. There will be information from the application form, interview or discussion that may give you clues to the areas of learning needed. Skills for Care’s Common Induction Standards provide a foundation of knowledge required to work with people with health and social care needs. ([www.skillsforcare.org.uk/cis](http://www.skillsforcare.org.uk/cis))

4.2 How do I ensure that the PA gets the learning needed?

You should talk this through with your PA to find out the best way they learn new things.

For example, through:
- seeing how other people work
- going on training courses
- e-learning
- supervision sessions.

**Things to think about**
Learning is important for you and the personal assistant and the ideal way is to discuss what, how, when and where the learning takes place considering your circumstances, funding available and responsibilities. The Common Induction Standards will tell you more about the important areas that PAs need to know to understand their job and responsibilities. You will probably have other areas that you will want to include, such as your own expectations.
4.3 What do I need to do to develop my learning as an employer?

Other questions you may ask are:
- What do I need skills and knowledge in?
- From whom and where will I get my learning from?

Things to think about
Once you or your personal assistant has undertaken learning/training, has it made a difference in improving working practice and your relationship? Are they better at doing the things you need them to do?
5. When a personal assistant leaves

There will be occasions when you will have personal assistants who no longer want or are able to provide you with support. It is important to think about the issues of:

- having an interview and record for future reference
- confidentiality
- request for references
- property being accounted for
- updating of the NMDS-SC (National Minimum Data Set for Social Care)
- decisions about future level of contact with this personal assistant.

Things to think about
When a working relationship ends it may be on good or bad terms. However it is important to maintain a professional manner.
6. Your responsibilities as an employer

- Think about the type of relationship you want with the personal assistant.
- Know the qualities you want from a personal assistant.
- Know what tasks you want the personal assistant to be involved in.
- Be assertive.
- Question values and practices.
- Be prepared to guide, teach and inform the personal assistant through individual and shared learning.
- Decide who else needs to be involved in developing the personal assistant.
- Be clear about the use of IT by the personal assistant while working for you.
- Know what you need to do to be a good employer.
- Consider in what ways you have support from others to discuss and share your experiences of being an employer.
- Have safeguarding checks in place, e.g. Criminal Records Bureau (CRB) checks and previous employer references.
- Be able to manage conflict and tension between yourself and the worker.
7. Resources

There are materials, tools and checklists available online and in hard copy which may be useful in looking at how to recruit and keep your personal assistant.

**Skills for Care resources**

Employing personal assistants toolkit - [www.skillsforcare.org.uk/employingpas](http://www.skillsforcare.org.uk/employingpas)

Providing effective supervision - [www.skillsforcare.org.uk/pes](http://www.skillsforcare.org.uk/pes)

Personalisation and partnership - [www.skillsforcare.org.uk/individualemployers](http://www.skillsforcare.org.uk/individualemployers)

Common Induction Standards - [www.skillsforcare.org.uk/cis](http://www.skillsforcare.org.uk/cis)

National Minimum Data Set for Social Care - [www.skillsforcare.org.uk/nmds-sc](http://www.skillsforcare.org.uk/nmds-sc)

Adult social care qualifications profiles - [www.skillsforcare.org.uk/qcf](http://www.skillsforcare.org.uk/qcf) > supporting materials

**Other organisations who may be able to provide support**

Local direct payment support organisations or user-led organisation


Social Care Institute for Excellence – [www.scie.org.uk](http://www.scie.org.uk)

Skills for Health – [www.skillsforhealth.org.uk](http://www.skillsforhealth.org.uk)

Think Local Act Personal – [www.thinklocalactpersonal.org.uk](http://www.thinklocalactpersonal.org.uk)