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# Templates

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# Sample job description and person specification

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**Job title:** Personal assistant (PA)

**Reporting to:** (Your name)

**Location:** (The area where you live - do not put your home address)

## **Job purpose:**

- To assist with a variety of tasks which will enable/assist the employer/person who needs care and support to live their personal and social life according to their wishes and interests.
- This role involves live-in or overnight support.

## **About the employer:**

- Give a description of you/the person who needs care and support, for example, gender, age, likes, pets and hobbies.
- Give a description of your/the person who needs care and supports' circumstances, for example, wheelchair user, complex health/care needs, specific medical or other conditions such as Cerebral Palsy, Epilepsy, Downs Syndrome, a learning disability or brain injury.

## **Main duties:**

- **Social duties**, for example, support to:
  - keep in touch and socialise with family and friends
  - attend adult education classes
  - attend medical appointments
  - do hobbies such as dog walking, yoga or playing a sport
  - attend social events such as music gigs or the cinema
  - attend work.

- **Personal care**, for example, support with bathing, showering, shaving, teeth cleaning, dressing, catheter care, PEG feeding, administering medication, eating or performing exercises/physiotherapy.
- **Domestic duties**, for example, support with grocery shopping, cooking and serving nutritious meals and snacks, cleaning, changing linen, laundry, ironing and gardening.

These duties may vary from day to day.

### Type of person that you/they are looking for:

- **Values**, for example, honest, reliable, punctual, non-judgemental, ability to build good relationships based on trust and respect, flexible, adaptable, easy going, able to work alone, positive, willingness to travel, understands equality and diversity or has a good sense of humour.
- **Specific requirements**, for example, someone with an understanding of a specific condition, or has a shared language or customs.
- **Other**: for example, due to the nature of this role including medical/personal care the potential employer will be considering female/male applicants only.

### What you can expect to receive:

Use this section to attract people to the role, for example, you could say that full training will be given, how they will be supported during their induction/first few weeks of working with you, access to other training opportunities, competitive rate of pay, flexible working and work place pension.

### Hours of work:

List the days and hours of work – you can add ‘flexible hours to be mutually agreed’ if you wish.

## Rate of pay:

If the hours include evenings, sleepovers or weekends, list the different rates of pay, for example, weekdays - £8.00 per hour or sleepover - £37.80.

## Skills, qualifications and experience – you can add skills or qualifications that are relevant for you:

**Essential:** list the essential skills, qualifications and experience that personal assistants need to have, for example:

- driving licence
- car and appropriate insurance
- knowledge of a particular language or culture
- able to swim
- nursing qualification
- confidentiality
- good at building relationships
- specialist communication skills, for example, British Sign Language or Makaton, or a willingness to learn them.

**Preferred:** list the desirable skills, qualifications and experience that you would like your personal assistant to have, for example:

- computer literate
- good communicator
- likes dogs or other pets
- a good listener
- ability to support people with behaviours which challenge.

# Sample job adverts

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## Personal assistant required

We're looking for someone who is reliable, a good communicator and shows dignity and respect towards others, to become a personal assistant (PA).

As a PA you'll support a disabled man with personal care, at meal times, with going out into the community, and work a sleeping night and a waking night on alternate Saturdays.

You'll work in his home in the Leeds area, from 14.45 on Saturday through to 14.45 on Sunday.

You must have held a clean driving license for at least one year and be over 21 years of age, as you'll need to drive specialised transport.

The rate of pay will be around £9 per hour, and you'll be given a full induction and training when in post. If you're successful, you'll need to provide an enhanced DBS check which will be paid for by the employer.

If you're interested and have the right values and skills, please send a CV and short covering letter to S Holmes, PO BOX 221b, London BS18 E59.

The closing date for applications is [\(insert a date one month from when the advert was placed\)](#).

## Personal (care) assistant required

I am looking for a caring and empathetic person to join my small team as a personal assistant (PA).

I'm a 26 year old woman with a spinal injury and employ a team of PAs to enable me to live independently.

Experience of care and/or spinal injury is preferred but not essential as full training will be provided. For me, it's more important to recruit someone who's the right type of person.

I have four key values that I look for in PAs:

- reliable and trustworthy
- knowing when it's appropriate to step in and help
- maintaining a balance between caring and supporting
- a willingness to learn.

If you can empower, encourage and respect my right to make my own decisions about how I want to be cared for, and are willing to learn new skills, I'd like to hear from you!

Daily tasks will include helping me to get washed and dressed, shopping, assisting with household tasks and supporting me to access the community.

You will work Monday to Friday 8am until 10am and 6pm until 8pm, with opportunities to work additional hours.

If you think that you have the right values to join my team, please send me a CV and brief cover letter to S Holmes, PO BOX 221b, London BS18 E59. Closing date for applications is [\(insert a date one month from when the advert was placed\)](#).



# Sample job application form

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<b>Full name:</b>	
<b>Address:</b>	
<b>Telephone number:</b>	

## Education and training

Details and results of any exams taken:

Date	Exams	Grade

Details and results of any further education and/or training, for example, technical college, evening classes:

Date	Course	Grade (if applicable)

Please give details about any other relevant courses or training:


## Employment history

<b>Current employer name and address:</b>	
<b>Job title:</b>	
<b>Main duties:</b>	
<b>Rate of pay:</b>	
<b>Date employed from and to:</b>	

No approach will be made to your present employer before an offer of employment is made to you.

**Please tell me about other jobs that you have done and about the skills that you used and/or learned in those jobs:**

**Please tell me why you have applied for this post and how your personal values make you suited for the job - give examples of things that you have done that show this:**

Have you ever been convicted of a criminal offence? **YES / NO**  
(declaration subject to the Rehabilitation of Offenders Act 1974)

If you are disabled, please tell me about any adjustments that I may need to make to support you at interview:

Please tell me if there are any dates when you will **not** be available for interview:

I can confirm that, to the best of my knowledge, the above information is correct. I accept that providing deliberately false information could result in my dismissal.

**Signature:**

**Date:**

# Sample letter inviting people for an interview

---

Your name  
c/o Direct payment advisor/Jobcentre Plus/PO Box\*

**Date:**

**Name of applicant:**

**Address of applicant:**

Dear (applicant's name)

## Personal assistant position

Further to your application for the position of personal assistant, I would be delighted if you could attend an interview on (date) at (time) at (address).

Please write to the above address to confirm that you are able to attend.

(You may want to include a map for the location of the interview.)

(If you are paying people's interview expenses, put the details here.)

I look forward to seeing you.

Yours sincerely,

(Your name)

**\* Put a return address on the letter. Use the address that you used for applications, and not your own address**

# Sample letter telling people that they have not got an interview

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Your name  
c/o Direct payment advisor/Jobcentre Plus/PO Box\*

**Date:**

**Name of applicant:**

**Address of applicant:**

Dear (applicant's name)

## **Personal assistant position**

Further to your application for the position of personal assistant, I regret to inform you that you have not been selected for interview on this occasion.

Thank you for your interest and taking the time to apply for the position.

Yours sincerely,

(Your name)

**\* Put a return address on the letter. Use the address that you used for applications, and not your own address**

# Sample letter offering the job

---

Your name  
c/o Direct payment advisor/Jobcentre Plus/PO Box\*

**Date:**

**Name of applicant:**

**Address of applicant:**

Dear (applicant's name)

## Offer of employment

Further to your recent interview, I am pleased to be able to confirm the following offer of employment, subject to satisfactory references.

<b>Job title:</b>	Personal assistant
<b>Hours of work</b>	(insert hours of work)
<b>Annual leave</b>	(insert number of days/hours)
<b>Probationary period</b>	(insert number of weeks)
<b>Salary</b>	(insert salary)
<b>Start date</b>	(insert start date)

I would be grateful if you could confirm your acceptance in writing or by phone.

Yours sincerely,

(Your name)

**\* Put a return address on the letter. Use the address that you used for applications, and not your own address**

# Sample letter turning down an applicant

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Your name  
c/o Direct payment advisor/Jobcentre Plus/PO Box\*

**Date:**

**Name of interviewee:**

**Address of interviewee:**

Dear (interviewee's name)

With regards to the interview held on (date) for the position of personal assistant, I regret to inform you that you have not been successful on this occasion.

(If you are offering people feedback on why they did not get the job, say so here and give details about how they can contact you.)

Thank you for taking the time to make your application and attend the interview and I hope you find a suitable position in the near future.

Yours sincerely,

(Your name)

**\* Put a return address on the letter. Use the address that you used for applications, and not your own address**



# Sample contract of employment

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## Statement of main terms and conditions of employment

**Employer's name:**

**Employee's name:**

**Date of commencement of employment:**

**Main place of work:**

**Job title:** Personal assistant

**Duties and responsibilities:**

As set out in the job description. The employer may require you to carry out other reasonable duties as required.

**Probationary period:**

There will be a probationary period of (\*usually three months). At the end of this period, the position will be reviewed and, if satisfactory, the continuation of your employment will be confirmed. During the probationary period, either party can terminate employment by giving one week's notice.

**Hours of work:**

Your hours of work will be:

- (Insert number of hours) weekday hours
- (Insert number of hours) weekend hours
- (Insert number of sleepovers if required) sleepover(s)

There is a need for the employee to be flexible and these hours may be changed as required according to the employer's needs. If hours need to be changed or additional hours worked, the employer will give as much notice as possible.

### **Lateness:**

If you are going to be more than 10 minutes late you are required to contact the employer as soon as possible, but at the very latest 30 minutes before you are due to start work.

### **Salary:**

As an hourly paid employee your salary will be:

- £(insert weekday hourly rate before National Insurance Contributions or Tax deductions) for weekdays
- £(insert weekend hourly rate before National Insurance Contributions and Tax deductions) for weekends and bank holidays
- £(insert rate for sleepover before National Insurance Contributions and Tax deductions) for sleepovers.

Your salary is payable (insert either monthly or weekly) and will be paid on (insert date of salary payment. If monthly, it could be the third working day of the month or last Friday in the month, for example. If weekly, insert day of payment) by (insert direct payment into your bank/cheque/cash).

The employer will deduct National Insurance and Income Tax as required by law. The employer may also deduct any overpayment of wages or holiday entitlement.

### **Pensions:**

There is no pension scheme available with employer's contributions, however, if you are eligible you may be offered access to a stakeholder pension scheme.

### **Time sheets:**

You will be required to complete a (insert either monthly/weekly depending on payment of salary) signed time sheet and submit this to the employer on (insert day of the month or week giving time to work out wages or send to payroll agency to ensure wages can be paid on the given date).

### **Holiday entitlement:**

The holiday year is from (insert holiday year – usually either 1 January–31 December or 1 April–31 March). Your holiday entitlement must be taken during this period. Payment will not be made for any unused holiday and these cannot be taken into the next holiday period.

The full amount of your holiday entitlement is (insert number of weeks and/or days) per year, pro-rata, per completed months employment. One week being the equivalent of weekly hours worked.

Bank holidays may be booked as holidays or will be paid at the weekend rate.

Holidays must be agreed with the employer at least (insert how many weeks – four weeks is usual) in advance. You may not take more than (insert number of days – 10 days is the usual) working days consecutively without the employer's prior written consent.

If you leave employment and you have exceeded your holiday entitlement, this will be deducted from your final wage. If holiday entitlement is owed, you will be paid for the outstanding entitlement.

(Take out if this is not appropriate) If it is agreed that you will accompany your employer on holidays as part of the required support, this time will be counted as working hours and you will not be expected to use your holiday entitlement.

## **Sick leave:**

If you are ill and unable to attend work you should inform your employer as soon as possible to enable other arrangements to be made.

You will be entitled to Statutory Sick Pay (SSP) on production of an Employee's Statement of Sickness (form SC2) which must be completed for sick leave of more than three days or a medical certificate for sick leave of more than seven days. These forms must be sent directly to your employer.

## **Termination of employment:**

During the probationary period either party requires one week's notice.

Up to two years of continuous employment, you will be given one week's notice.

After two years continuous service, you will be given one additional week's notice for each completed year, up to a maximum of 12 weeks' notice.

After satisfactory completion of your probationary period you are required to give [\(insert notice period, for example, one month\)](#) notice in writing irrespective of length of service.

The employer reserves the right to pay your basic salary in lieu of notice instead of requesting that you work your notice period. In these circumstances you may not be employed by any other person or company whilst receiving pay in lieu of notice.

The employer reserves the right to dismiss you without notice in cases of serious breach of the terms of your employment, gross misconduct or gross negligence by you.

## Confidentiality:

All information regarding the employer, the employer's family and the employer's domestic or personal circumstances is strictly confidential and cannot be discussed with a third party without the employer's specific permission, or in an emergency situation.

The employer will hold personal information about you as personnel records. The employer will abide by the Data Protection Act and disclose this information only to the relevant third parties e.g. HM Revenue and Customs.

## Grievance procedure:

If you have a grievance you should comply with the grievance procedure. For more information contact ACAS on 08457 474747 or see their grievance procedure guidance on [www.acas.org.uk/dgcode](http://www.acas.org.uk/dgcode).

## Disciplinary procedures:

Minor problems will be dealt with and resolved informally.

In cases of more serious problems, depending on the seriousness of the breach of terms and conditions of contract or conduct and performances of your duties, one of the following disciplinary actions may be taken.

- A verbal warning which will be confirmed to you in writing and recorded in your personnel file for a period of (six months is usual, but you must specify).
- A first written warning, which will be confirmed to you in writing and recorded in your personnel file for a period of (12 months is usual, but you must specify).
- A final warning which would be confirmed to you in writing advising that further misconduct could lead to dismissal and recorded in your personnel file for a period of (12 months is usual, but you must specify).

## **Dismissal:**

In case of gross misconduct there will be no period of notice given. If you are in your probationary period or first year of employment, only one warning is required before dismissal.

Before any of these actions are taken you will receive a letter setting out the details of the alleged misconduct and inviting you to a meeting to discuss the matter. You will have the right to be accompanied to the meeting by a work colleague or a trade union representative.

After the meeting you will be informed if any further action will be taken. You have the right to appeal but must do so within 10 working days of receipt of the notification of the decision.

# Sample holiday request form

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<b>Year:</b>	
<b>Name of employee:</b>	
<b>Annual holiday entitlement:</b>	
<b>Carry over (if applicable):</b>	
<b>Entitlement for this year:</b>	

<b>First day of leave</b>	<b>Last day of leave</b>	<b>Number of days/hour leave</b>	<b>Requested by (initials)</b>	<b>Authorised by (initials)</b>	<b>Number of days/ hours remaining</b>

# Sample sickness absence recording form

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	Approved by (initials)						
Period of time covered:	Return to work interview						
	Reason for absence						
Job title:	Cumulative total days						
	Last day of absence						
Name:	First day of absence						



# Sample safety in the home checklist

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This checklist should be completed once a year, or each time there is a change to the environment.

**Name:**

**Home address:**

**Date checklist completed:**

	Satisfactory yes/no	Comments/actions required
Are the doorways clear of obstacles?		
Do the staircases have clear and easy access at all times?		
Are there any loose carpets on the floors or staircases?		
Are there any overloaded plug sockets?		
Is there adequate ventilation?		
Is the heating adequate and controllable?		
Is the lighting adequate?		
Is there any equipment that does not function properly?		
Are there any trailing or damaged flexes?		
Are there any damaged sockets?		

Does your personal assistant use visual display equipment?		
Do you have suitable and accessible fire-fighting equipment and has it been serviced within the last year?		
Does your personal assistant have adequate space to complete their work?		
Will your personal assistant have to excessively stretch or bend to complete tasks?		
Do you and your personal assistant have all the emergency contact numbers that you require?		

# Sample risk assessment

Review your risk assessments regularly to make sure that they are still relevant. If there is a significant change in your home, remember to check your risk assessment and, where necessary, amend it.

Step 4 How will you put the assessment in action?	Remember to prioritise. Deal with those hazards that are high-risk and have serious consequences first.
What further action is necessary?	You need to make sure that you have reduced risks 'so far as is practicable'. List what more needs to be done here.
Step 3 What are you already doing?	List what is already in place to reduce the likelihood of harm or make harm less serious
Step 2 Who might be harmed and how?	<p>Identify possible people.</p> <p>Remember:</p> <ul style="list-style-type: none"> <li>■ some workers have particular needs</li> <li>■ people who may not be in your home all the time</li> <li>■ visitors</li> <li>■ think about how your work affects others present.</li> </ul> <p>See how the hazard could cause harm.</p>
Step 1 What are the hazards?	<p>Spot hazards by:</p> <ul style="list-style-type: none"> <li>■ looking at your 'safety in the home' checklist</li> <li>■ visiting the 'your industry' area of the HSE website or calling the HSE infoline</li> <li>■ calling the Workplace Health Connect Advice line or visiting their website</li> <li>■ checking manufacturer's instructions</li> <li>■ contacting your direct payment support service.</li> </ul>

# Training needs form

<b>Name:</b>						
<b>Date commenced work with employer:</b>						
<b>Start date of training needs form:</b>						
<b>Goals: what needs to be achieved and why?</b>	<b>Agreed learning and development activities to achieve goals</b>	<b>Who will arrange this?</b>	<b>When and where will the learning and development take place?</b>	<b>Date started</b>	<b>Date completed</b>	<b>Comments</b>


# Sample disciplinary form

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Here is a sample disciplinary form. ACAS has a more detailed version called 'The ACAS Code of Practice on Discipline and Grievance', which you can download at [www.acas.org.uk](http://www.acas.org.uk).

## 1. Purpose of the policy

The aim of this policy is to support good conduct and performance. This policy sets out the action which will be taken when disciplinary rules are breached.

(Guidance Notes 1: The purpose should remind people that the policy is not designed as a dismissal procedure, but as a means of encouraging personal assistants to meet a good standard.)

## 2. Principles

If you are subject to disciplinary action:

- the procedure is designed to establish the facts quickly and to deal consistently with disciplinary issues. No disciplinary action will be taken until the matter has been fully investigated
- at every stage you will be advised of the nature of the complaint, be given the opportunity to state your case, and to be represented or accompanied by an advocate of your choice (this could be a fellow employee, a union representative or a friend)
- you will not be dismissed for a first breach of discipline except in the case of gross misconduct, when the penalty will normally be dismissal without notice and without pay in lieu of notice
- you have a right to appeal against any disciplinary action taken against you.

(Guidance Notes 2: Employers often lose at employment tribunals because they did not comply with the procedure – so always follow the procedure.)

### 3. Informal discussions

Before taking formal disciplinary action, I will make every effort to resolve the matter through informal discussions with you. Only where this fails to bring about the desired improvement will the formal disciplinary procedure be implemented.

(Guidance Notes 3: Make sure that personal assistants understand the difference between a routine complaint and action taken under the policy.)

### 4. First warning

If your conduct or performance is unsatisfactory, you will be given a written warning. This warning will be recorded, but disregarded after (insert number of months - usually six or 12 months) months of satisfactory work. You will be informed that a final written warning may be considered if there is no sustained satisfactory improvement or change. (Where the first offence is serious, for example, because it is having a serious harmful effect, I may move directly to a final written warning.)

(Guidance Notes 4: It can be unfair to keep details of warnings on an employee's file indefinitely. Unless a warning is for a very serious matter, it should be disregarded after a reasonable amount of time, for example, six months to a year. The written warning should accurately record the warning given at the disciplinary interview. Do not write the warning before the interview.)

### 5. Final written warning

If the offence is serious, there is no improvement in standards, or if a further offence of a similar kind occurs, a final written warning will be given. This will include the reason for the warning and a note that if no improvement results within (insert number of months - usually six or 12 months) months, you will be dismissed.

(Guidance Notes 5: The warning should state clearly that dismissal will result from a failure to comply. Except in cases of gross misconduct, employees should receive notice or payment in lieu.)

## 6. Statutory discipline and dismissal procedure

If you face dismissal, the minimum statutory procedure will be followed. This involves:

- step one: a written note to you setting out the allegation and the basis for it
- step two: a meeting to consider and discuss the allegation
- step three: a right of appeal including an appeal meeting.

You will be reminded of your right to be accompanied by an advocate.

## 7. Gross misconduct

If, after investigation, it is confirmed that you have committed an offence of the following nature, the normal consequence will be dismissal without notice or payment in lieu of notice: theft, damage to property, fraud, incapacity for work due to being under the influence of alcohol or illegal drugs, physical violence, bullying and gross insubordination.

(Note: the list is not exhaustive)

While the alleged gross misconduct is being investigated, you may be suspended, during which time you will be paid your normal pay rate. Any decision to dismiss you will be taken by me only after full investigation.

## 8. Appeals

If you wish to appeal against any disciplinary decision you must appeal in writing within five working days of the decision being communicated to you. Someone who was not involved in the original disciplinary action will hear the appeal and decide the case as impartially as possible. (Note: you will need to think in advance who this might be, for example, a local advocacy agency, independent living advisor, direct payment support service or user led organisation.)



(Guidance Notes 6: Operating the disciplinary procedure. The 'ACAS Advisory Handbook – Discipline and Grievances' at work gives some useful information. You can download it at [www.acas.org.uk/dgcode](http://www.acas.org.uk/dgcode) or order it from 08456 06 16 00.)

Before taking disciplinary action using the procedure, it will be ensured that:

- the matter cannot be resolved through informal counselling
- the matter has been fully investigated
- you are told that you will be interviewed and have the right to be accompanied by a fellow employee, friend or a trade union official of your choice.

At the disciplinary interview, it will be ensured that:

- you know the details of the allegation
- you have the opportunity to put across your side of the matter
- any disciplinary measure is appropriate to the circumstances.

If a warning is given, it will tell you:

- the level of improvement required
- the date by which it is to be achieved
- what will happen if it is not
- how to appeal.

# Sample grievance policy

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## 1. Introduction

This policy is to help resolve grievances that you have, relating to your employment, as quickly and as fairly as possible.

## 2. Informal discussions

If you have a grievance about your employment you should discuss it informally with me. I hope that most concerns will be resolved in this way.

## 3. Statutory grievance procedure

If you feel that the matter has not been resolved through informal discussions, you should raise it formally. You should follow the procedure below. Under the statutory grievance procedure:

<b>Step 1</b>	You must inform me of your grievance in writing.
<b>Step 2</b>	I will invite you to a meeting to discuss the grievance and notify you in writing of the decision. You have the right to be accompanied by a representative at all grievance meetings. This could be another employee, friend or union representative.
<b>Step 3</b>	A right of appeal including an appeal meeting.

## 4. Appeals

If you wish to appeal against any decision, you must appeal in writing within five working days of the decision being communicated to you. Someone who was not involved in the original grievance will hear the appeal and decide the case as impartially as possible.

(Note: You will need to think in advance who this might be, for example it could be a local advocacy agency, independent living or direct payment adviser or a user led organisation).

