Logo, company name

Description automatically generated**A way of agreeing how**

**we will work together:**

**a guide for individual employers**

**and personal assistants**

Template

# How can I use this document?

You can use it to have a conversation about what would work well for each other so you can agree how to work together.

It can:

* make sure you are a good fit for each other
* establish boundaries
* help to find out if any learning and development is needed
* be used flexibly to fit with your working relationship
* complement other documents, for example, contract of employment, employee handbook,
* job description, information from insurance providers and more.

## Template instructions:

Use this template to expand on what will make your unique working relationship a success. The boxes under each of the statements are there so you can discuss what they mean to you.

Discussions can be done in a way that suits you whether it is together, or separately and then jointly.

Use it as part of your development together as employer and PA.

Fill it in during induction or a work trial, review and update it during supervision or reviews, or when things change.

# Our code of conduct

**An agreement between [employer]**

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and

**PA Name**

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We recognise and accept that this is a way to have a conversation about our values and expectations and what would work well. It’ll help us to agree how to work together.

## About me (employer)

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# As your employer I will:

## Comply with my legal and other responsibilities.

### Links to help you do this:

* [Employing personal assistants toolkit](http://www.employingpersonalassistants.co.uk/)
* [Employing staff for the first time](https://www.gov.uk/employing-staff)

Source: Gov.uk, Skills for Care

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## Give you a contract of employment from day one of employment.

### Links to help you do this:

* [Employment contracts](https://www.gov.uk/employment-contracts-and-conditions)
* [Contact of employment template](https://www.skillsforcare.org.uk/Employing-your-own-care-and-support/Information-for-individual-employers/Templates.aspx)

Source: Gov.uk, Skills for Care

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## Promise to ensure that you are paid as set out in your contract and work to investigate and resolve issues with payments if they occur.

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## Make sure you have an induction, and regular supervision/reviews.

### Links to help you do this:

* [Managing and developing your PA](https://www.skillsforcare.org.uk/Employing-your-own-care-and-support/Information-for-individual-employers/Managing-and-developing-your-PA.aspx)

Source: Skills for Care

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## Maintain confidentiality and keep personal information about you safe, for example, not discussing your business with other PAs.

### Links to help you do this:

* [Disability Sheffield’s digital security practical guide for IEs](https://www.disabilitysheffield.org.uk/admin/resources/digi-sec-guidev6.pdf)

Source: Disability Sheffield

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## Ensure you can carry out your role safely, for example by providing the right equipment, discussing your health and welling needs etc.

### Links to help you do this:

* [Health and safety: employer responsibilities](https://www.hse.gov.uk/workers/employers.htm)
* [Safety in the home check list](https://www.skillsforcare.org.uk/Employing-your-own-care-and-support/Information-for-individual-employers/Templates.aspx)
* [Wellbeing resource finder](https://www.skillsforcare.org.uk/Leadership-management/managing-people/Wellbeing/Wellbeing-tool/Wellbeing-tool.aspx)

Source: HSE, Skills for Care

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## Make reasonable adjustments so you can do your job, for example, tweaking working times or tasks undertaken if possible etc.

### Links to help you do this:

* [Reasonable adjustments](https://www.acas.org.uk/reasonable-adjustments)

Source: ACAS

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## Treat you with respect: Value and appreciate the work that you do to support me.

## Respect your privacy.

### Links to help you do this:

* [Disability Sheffield’s digital security practical guide for IEs](https://www.disabilitysheffield.org.uk/admin/resources/digi-sec-guidev6.pdf)

Source: Disability Sheffield

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## Discuss and agree the plan for the day.

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## Be clear about what I can and cannot do, for example, acknowledge that circumstances may change over time e.g. medical conditions.

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## Have a plan in place for cover if you are not able to work.

### Links to help you do this:

* [Contingency plan template](https://disabilitysheffield.org.uk/admin/resources/direct-payments-contingency-plan-template-final-electronic-pdfversion.pdf)

Source: Disability Sheffield

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## Recognise that you can seek independent employment advice: No one should feel that they are alone or have no one to talk to.

### Links to help you do this:

* [ACAS](https://www.acas.org.uk/)
* [Citizen’s Advice](https://www.citizensadvice.org.uk/)
* [Unison](https://www.unison.org.uk/)

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## Make sure your role is understood with the people that matter in my life. E.g. family, friends, doctors, pharmacists, social worker, my employer

### Links to help you do this:

* [PAs continuing to support people during a hospital admission](https://www.skillsforcare.org.uk/Documents/Recruitment-and-retention/Employing-your-own-care-and-support/PAs-in-hospitals/PAs-continuing-to-support-people-during-a-hospital-admission.pdf)
* [Taking on a PA to support you at work](https://workplacepersonalassistant.org/)

Source: Skills for Care, Workplace Personal Assistant

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## Support you to develop and sustain the knowledge and skills needed to support me.

### Links to help you do this:

* [Managing and developing your PA](https://www.skillsforcare.org.uk/Employing-your-own-care-and-support/Information-for-individual-employers/Managing-and-developing-your-PA.aspx)
* [Funding for training](http://www.skillsforcare.org.uk/iefunding)

Source: Skills for Care

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# As your PA I will:

## Turn up to work when I am supposed to and where this is not possible, I will let you know so you can make arrangements for someone else to support you.

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## Treat you with respect:

* Recognise that you want to make your own choices
* Uphold your dignity
* Be honest
* Respect your privacy
* Maintain confidentiality, for example, I will not have conversations with others about you.

### Links to help you do this:

* [Care Certificate Standard 7](https://www.skillsforcare.org.uk/Documents/Learning-and-development/Care-Certificate/Standard-7.pdf)

Source: Skills for Care

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## Support you to manage risk in a positive way and learn from any mistakes.

### Links to help you do this:

* [Self-care and taking informed risks](https://www.skillsforcare.org.uk/Learning-development/ongoing-learning-and-development/self-care/Self-care.aspx)

Source: Skills for Care

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## Be open with you. E.g. communicate how I’m feeling or if I’m unwell.

### Links to help you do this:

* [Care Certificate standard 6 - communication](https://www.skillsforcare.org.uk/Documents/Learning-and-development/Care-Certificate/Standard-6.pdf)

Source: Skills for Care

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## Commit to doing the necessary training needed to support you.

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## Promote equality, diversity and inclusion.

* Recognise that your circumstances are personal to you.
* Work in a personalised way, rather than the way I want to do things.

### Links to help you do this:

* [Care Certificate standard 4 – equality and diversity](https://www.skillsforcare.org.uk/Documents/Learning-and-development/Care-Certificate/Standard-4.pdf)
* [Care Certificate standard 5 – work in a person centred way](https://www.skillsforcare.org.uk/document-library/standards/care-certificate/standard-5-2.pdf)
* [Being person centred](https://disabilitysheffield.org.uk/admin/resources/editable-text-boxes-being-person-centred-2019-compressed.pdf)

Source: Skills for Care, Disability Sheffield

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## Use the equipment e.g. use PPE, hoists etc provided in the right circumstances.

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## Work with you and others, e.g. other PAs, family, friends etc. in an open and honest way.

* Recognise that your circumstances are personal to you.
* Work in a personalised way, rather than the way I want to do things.

# We agree to:

## 1. Work together to:

* promote independence
* support choice
* show mutual respect.

### Think about:

* Individual employers are the expert in their own life and make their own decisions and mistakes.
* What independence means and agree how your PA can support this.
* How are choices made, would you value input from your PA? What happens if you PA doesn’t like your choice and vice versa?
* What are reasonable risks and how they can be overcome or reduced?
* Can PAs support with positive risk taking?
* How will you treat each other? For example, some people may require a lot of support in their lives but would expect to be treated as an adult who can make their own decisions.
* Feedback, either good or bad and how that will be welcomed.
* How will unacceptable behaviour be challenged?

### You could agree statements, like:

* As your PA I will promote your independence when appropriate and provide support when needed.
* As your PA I will not restrict your choices even if they appear to be risky.
* As your PA I will not wear headphones whilst at work.
* As your employer I will respect your choice not to support me with [ … activity] because of your concerns.
* As your employer I will value what you do to support me.
* We will discuss if there is unacceptable behaviour without making it personal.

**Use this space to agree what it means for your working relationship**

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| What this means to us: |

## 2. Respect each other’s differences in:

* personality
* culture
* lifestyle.

In your discussions you’ll need to be aware of equality and diversity and that certain characteristics are protected.

For more information about protected characteristics please visit

<http://www.gov.uk/discrimination-your-rights>.

### Think about:

* How you think, feel, behave etc.
* Different personalities, for example quiet personalities be respected as much as loud personalities.
* How different environments or circumstances may have an influence on behaviour or feelings.
* Your beliefs, customs, and social behaviour
* The way you live
* Your interests
* Opinions
* Unique contributions each of you can bring.

### You could agree statements, like:

* As your PA I respect your beliefs, even if I don’t agree with them.
* As your employer I understand and respect your decisions to […] provided they do not impact your ability to support me in the way that I wish to live my life.

**Use this space to agree what it means for your working relationship**

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| What this means to us: |

## 3. Communicate and understand each other so we can:

* express how we feel about things that are frustrating us
* give each other opportunity to give our point of view
* make sure neither of us feel like we have been silenced.

### Think about:

* How will you respect, promote and advocate an open conversation?
* Is it helpful to know if something has gone wrong or isn’t going to plan, so that problems can be discussed and sorted out?
* Agreeing communication methods, for example, discussions, messages, recognising verbal/non-verbal clues.
* How confident you would be discussing problems.
* What would happen if you couldn’t reach an understanding, would you seek advice/ ask for a mediator?
* Making sure there are opportunities to be heard (in whatever form that takes).
* How can you PA seek independent advice?
* How can employers seek independent advice?

### You could agree statements, like:

* We will promote and value open and honest conversations.
* I understand that as my PA you may wish to seek out independent advice.

**Use this space to agree what it means for your working relationship**

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| --- |
| What this means to us: |

## 4. Grow together:

* recognise the opportunity to learn from each other’s life experiences and develop skills.
* it takes time for new employers to and PAs to feel confident in their roles.
* understand each other’s goals and aspirations now and in the future.

### Think about:

* What things might change in the future? How can you both understand what this means? Is there an opportunity to plan for the changes?
* Are you new to being an employer?
* Is this your first PA role?
* There may not be opportunity for promotion or pay rises; how do you feel about this, will it be an issue in the future?
* Will funding (e.g. direct payments) determine how much is possible?
* How do you feel about learning new skills?
* What funding can you access for learning and development?
* What are your goals and aspirations? Are they personal, professional or both?
* What can we do to achieve goals or aspirations?

### You could agree statements, like:

* I will promote learning and development by improving my own skills and knowledge as an employer.
* I will participate in training as needed to support you in a way that meets your needs.
* We aim to learn from each other’s life experiences.

**Use this space to agree what it means for your working relationship**

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| What this means to us: |

## 5. Be flexible when appropriate, understanding:

* each employer may choose to do things differently
* some things may not be possible on a particular day
* we can agree where initiative can be used or when we can be empowered.

### Think about:

* How does this apply to both employer and PA?
* Will you agree that as much notice as possible will be given and what would you like that to be?
* Discussing and ensuring understanding of how you as an employer like to do things and when it’s ok to be flexible or do things differently.
* What might be unreasonable expectations? How with these be managed?
* Discuss the skills and knowledge of your PA and how they can be used to support you in ways you may not have considered.
* What circumstances might mean certain activities or jobs could not be done on a particular day, for example if your PA is not feeling their best, most employers would like to know?
* When would it be ok for your PA to use their initiative?
* Discuss what empowerment means to you as a person and how your PA support you to be empowered, for example, in making decisions, carrying out activities etc.

### You could agree statements, like:

* If my employer is having a bad day (for whatever reason) our plans may need to change and I will respect and do the things/duties/tasks we agreed instead.
* As your PA I understand that you may wish to work in a different way to my previous employers.

**Use this space to agree what it means for your working relationship**

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| What this means to us: |

## 6. Respect boundaries:

* acknowledge that it’s a professional relationship
* establish what is acceptable and not acceptable
* know what to do when boundaries are crossed
* understand the role of the people around me (e.g. family, friends, employer, professionals etc.)

### Think about:

* Discussing and describing your understanding of ‘professional’.
* How will you acknowledge that there will be elements of friendship in your working relationship?
* Discuss and agree what you will and won’t accept so you know that a boundary has been crossed.
* What will happen if boundaries are crossed, do you both have an understanding, will there be consequences, if so, what will they be?
* What are the dynamics in your household, your work place, with the people around you?
* What role do the people around you play in providing support and the way you live [employer]/do your job as a PA? For example, family/friends/colleagues etc.

### You could agree statements, like:

* We understand that our professional relationship takes priority above our friendship.
* As my PA you will not be asked to do tasks by my family beyond what’s been agreed.

**Use this space to agree what it means for your working relationship**

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| What this means to us: |

## Signed:

**Employer**

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**PA**

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