

4 How to manage your personal assistant



Employing a personal assistant (PA) is just the beginning. This toolkit provides guidance on how to manage your PA when they have started work, through:

- ◆ **induction**
- ◆ **supervision**
- ◆ **day-to-day management**



Induction

You've already written the job description so your PA knows what they will be doing. The induction enables you to go through the tasks in greater detail and introduces your new PA to your way of working. You explain what you want your PA to do, how you want it done and introduce them to your environment.

How to hold an induction

Start by **making a list of things** your new PA needs to know. What is the most important? But try not to overwhelm them on their first day.

Arrange to meet with your PA – perhaps before they start or on their first day.

Try to set the ground rules early – remember you are the boss and your PA should respect your views.

Training – the induction is a good time to discuss what training is needed and to develop a programme, for example, if there are children in the house safeguarding training will be needed. Leeds Centre for Integrated Living (Leeds CIL) will be able to advise you on what training opportunities are available.

Visit www.leeds.gov.uk/personalbudgets for more downloadable factsheets.

This publication can be provided in large print, Braille and audio.

☎ **0113 247 8630** to request a copy.

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Keep a **record** of the induction so your PA gets the right information at the right time. Don't forget though if your PA feels you are asking them to do something risky or that goes against what they have been trained to do they can say no.

- 1 Training before start date – if possible have them shadow an experienced PA.
- 2 On the first day:
 - ◆ **go over the contract again**
 - ◆ **explain any house rules, for example, switching off mobile phones, eating arrangements**
 - ◆ **show where things are kept**
 - ◆ **share a cuppa and explain how tea breaks will work**
 - ◆ **talk about the next shift and if there will be any differences from the one they've just done**
- 3 One month on have a review or supervision session and discuss how things are going and if anything needs clarifying. Make sure your PA knows so they can make any preparations.
- 4 One month after this repeat the session, and again one month after that until the probationary period is over. These sessions give you and your PA the chance to discuss how things are going and make any adjustments. Don't forget if you are happy with their work to tell your PA. It is also possible to extend a probationary period if you are not happy with their work.
- 5 Agree regular supervision sessions with your PA, perhaps every two months, to keep on top of any issues.

Supervision

Having regular formal meetings with your PA is a good idea as it enables you to talk about the job. The meeting could be once a month, or every three, six or 12 months, and is called a performance appraisal or supervision.

At these meetings you can:

- ◆ **assess if your PA is doing the job in the way you want**
- ◆ **give praise for good work or constructive feedback**
- ◆ **look at any problems, find out how to solve them perhaps through training or doing tasks differently**

But remember, an appraisal is a two-way process, your PA may have suggestions for you.

Remember to keep a record of your meeting.

External supervision/mediation

There are external services that can help you with supervision or even mediation. The service will have to be paid for and your direct payment adviser will be able to help you find this type of service.

Why would external supervision be helpful?

- ◆ **if you are new to supervision meetings and want to learn more about it**
- ◆ **to have an impartial person involved if things go wrong**
- ◆ **if you, or your PA, is feeling manipulated or unsure.**

A good supervisor will help you and your PA see both sides of a situation.

Day to day management

A good working relationship with your employee is important and will encourage your PA to stay working for you for a long time.

Here are some ways to encourage that relationship:

- ◆ **reward your PA**
- ◆ **give support and development**
- ◆ **good communication**
- ◆ **a good work-life balance**
- ◆ **boundaries**
- ◆ **putting yourself in their shoes**

Rewarding your PA

- ◆ **make sure your PA is being paid, at least, the 'going rate' – similar to other employees**
- ◆ **or extra holidays, training, flexible working**
- ◆ **verbal acknowledgement of work well done**

Support and development

A good induction, regular supervision meetings and training opportunities all help keep your PA.

Good work-life balance

Taking a flexible approach and supporting your PA's needs and preferences for working hours while still meeting your own needs is appreciated. Make sure your PA doesn't work longer than needed.

Communication

Good communication is crucial to good relationships and helps you understand and build relationships.

There are many different ways of communicating. To avoid any misunderstandings you need to establish how you and your PA will communicate with each other.

As part of the induction you need to tell your PA:

- ◆ **the forms of communication you prefer**
- ◆ **whether interpreters are needed, or special equipment, visual aids**
- ◆ **when they need to contact your family or other people who know you well.**

You may need to suggest training for your PA so they can develop the appropriate communication skills.

Do not employ a PA unless you know you can understand each other or will be able to do so after training.

Putting yourself in their shoes

Consider what your PA has to do and make sure that it doesn't cause them stress. If it does, are there any different ways of doing things?

Your home is your PA's workplace and their working conditions are just as important to them as your living conditions are to you.

Make sure your PA has everything they need to do their work. Are there any specialist training areas that would help your PA fit your requirements?

Most importantly make sure your PA feels appreciated and that good work is noticed. Communication is important, talk to them all the time not just if something has gone wrong.

Would you know if your PA felt unhappy in their work?

Boundaries

Every person has different boundaries but to make your relationship work you need to be clear what both your boundaries are.

Your relationship with your PA may not be like formal business relationships. PAs can

often feel more like friends than employees so boundaries can blur and working agreements are more relaxed.

When everything is going well you can both be more flexible but if something goes wrong, the boundaries are not respected, then the situation can be harder to deal with.

Keeping safe with money

It is very important to protect yourself, and your PA, when managing money. No matter how trustworthy someone is, it is always a good idea to have a few basic rules to avoid misunderstandings.

Looking after your money
Always ask your PA to keep receipts when shopping for you.
Be clear and precise about where and how to pay your bills.
Keep a small sum of cash (e.g. £10) available for your PA to use if they need to buy small items or pay small bills, such as the window cleaner.

Things you should not do
Never lend money to your PA or carer.
Never borrow money from your PA for any reason.
Do not ask your PA to use their money when shopping for you.
Do not leave money around the house unless it is for your PA to use.
Do not reveal your bank PIN number to anyone.
Do not allow your PA to become a signatory on your bank or building society account.
Never advance your PA's wages.
Never get involved with your PA's financial affairs.
PAs should never be the person who signs financial documents on your behalf.

More information:

Leeds CIL www.leedscil.org.uk