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Managing and developing your personal assistant

This section explains what you need to do once your personal assistant starts work and gives you advice and tips to help you to be a great manager.

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Induction

When your personal assistant starts, you should plan an induction to explain what you want them to do, how you want things to be done and introducing them to their workplace. You may also want to talk about training and how you can address any gaps in their skills and knowledge.

Here are some tips to help you to plan an induction.

- **Make a list** of things that you need to tell your new personal assistant on their first day. For example:
 - go through the contract of employment
 - explain your house rules (if you have any), for example about wearing slippers or indoor shoes, using a phone and eating arrangements
 - show them where things are kept
 - tell them when they can take breaks
 - explain any recording that they need to do, for example, notes about their shift or notes about the finances
 - explain what will happen on their next shift if it is different to what they may expect, for example, attending meetings, appointments or social activities.
- **Set aside time** with your new personal assistant on their first day. After one month, have a supervision to talk about how they are finding work.
- **Think about how you can best keep control** – you are the boss and your personal assistant should work with you and at your pace.
- **Arrange training before they start or before their first lone shift.** Where you can afford to do so, have a well-established personal assistant on the rota with new staff, so that they can shadow their work.
- **Keep a record** of what your personal assistant does during their induction. If they feel that you are asking them to do something that is risky or that goes against what they have been trained to do, they have the right to say no.

Care Certificate

You may want your new (or existing) personal assistant to complete the Care Certificate.

The Care Certificate is the standards that set out the knowledge, skills and behaviours that all care workers need. This will help them to learn about their job and understand the way that you want them to carry out their work.

Some of the standards might not be relevant to your personal assistant, but you can use the ones that are as part of their induction.

Download the standards and a workbook from our website at www.skillsforcare.org.uk/CareCertificate.

More information



Care Certificate

These standards set out the knowledge, skills and behaviours that all care workers need.

Visit www.skillsforcare.org.uk/CareCertificate

FAQs for personal assistants about doing the Care Certificate as part of induction (Skills for Care, 2018)

These FAQs answer some common questions about personal assistants doing the Care Certificate.

Visit www.skillsforcare.org.uk/PACareCert

Care Certificate personal assistant induction workbook (Independent Lives, 2015)

This workbook is for personal assistants when they start work. It sets the Care Certificate standards in the context of the personal assistant role. You can use it as part of their induction.

Download from www.skillsforcare.org.uk/PACareCertWorkbook

Charley's story



Charley is an individual employer and employs a team of six personal assistants to support her with her everyday care needs.

When new personal assistants join Charley's team, they do a month-long induction which is very hands-on.

During the first week they shadow experienced staff to find out more about Charley and what support she needs. This also gives them the chance to ask questions. In the second week, they start to do tasks themselves under supervision from other personal assistants, and in the final week they start working independently (if Charley is confident that they are competent to do so).

New personal assistants are supported to do training, such as moving and handling and health and safety. Where possible, Charley is involved in training and it is delivered in her house so that it is tailored to her needs.

They also get an employee handbook and access to Google Drive where they can download care plans, how-to videos and health and safety information.

She sets a six month probationary period which gives Charley and new staff the chance to settle into the job. She has found that this is the right amount of time for someone to learn the job and get an idea of whether it is right for them or not.

During these early days, Charley gives regular feedback via email and face to face meetings. They discuss what is going well and if they need any more support, for example, further training.

Supervision

It is a good idea for you to formally meet with your personal assistant at set times, to talk about the job. This could be, for example, once a month during the probationary period and every three or six months afterwards. This is called a **supervision**.

Supervisions are a two-way discussion between you and your personal assistant, that:

- help you to assess if your personal assistant is doing the job in the way that you want
- give you the chance to give constructive feedback and to praise staff for their good work
- give you time to address any problems and find better ways to do things, such as by doing training.

Getting support with supervision

If you want to do supervision yourself, you could do training to learn how. Your local support organisation or learning provider can help you to find training, and you can apply for funding to pay for it. Visit www.skillsforcare.org.uk/IEfunding to find out more about funding.

You could also use an external service to carry out supervision. Your social care or health direct payment adviser, local support organisation or the organisation that provides any funding that you receive may be able to help you find this type of service.

You might think about using an external service:

- if being an employer is new to you and you want to get an understanding of supervision
- to have an impartial person involved if things are going wrong
- if someone is feeling manipulated or unsure.

Claire's story



Claire and the CPS Trust do regular supervision to make sure that their personal assistants feel valued and continue to provide high-quality care and support.

For the first six months, personal assistants have a supervision every month. After this period, they have a supervision every three months.

They also have regular Periodic Service Reviews which scores them in the key areas of Claire's support. This helps them to identify any areas for development.

Each year, personal assistants set SMART (specific, measurable, agreed upon, realistic and time-based) personal objectives, and review these in an annual appraisal.

The team is encouraged to give feedback in between supervisions and appraisals - Claire has a communication book where they can leave messages and ideas, they have regular staff meetings and can feedback via a WhatsApp group. The trainer and manager have an open-door policy and are committed to resolving any issues quickly.

Day-to-day management: being a good employer

Being a good employer is important and may mean that your personal assistant will want to keep working for you for a long time.

Here are some tips to help you to be a good employer.

- Work in line with the Manager Induction Standards – these standards will help you to be a good manager.
- Value and respect your personal assistant – this includes treating them fairly and rewarding them for doing a good job.
- Be flexible - make sure that your personal assistant does not have to make a choice between home and work.
- Support your personal assistant to learn and develop.
- Imagine yourself in their position.
- Have good communication.
- Set clear boundaries.

The rest of this section explains these tips in more detail.

Work in line with the Manager Induction Standards

These standards set out what managers need to know and understand. They are designed to help you to recognise and develop your management skills, so that you can be a good employer.

If you are a new employer, they can help you to build confidence and understanding; for more experienced employers, they are a useful check and a way to review what you are already doing.

Download the standards from www.skillsforcare.org.uk/MIS.

Value and respect your personal assistant

If your personal assistant is happy in their work and fairly treated, they are more likely to keep working with you. Here are some of the things that you can do.

- Make sure that you are paying your personal assistant at least the ‘going rate’. Ideally, people’s pay should also reflect their skills, qualifications and responsibilities. Read more about paying your personal assistant in booklet 2, ‘Before your personal assistant starts’, of this toolkit.
- You may choose to pay a higher rate to a personal assistant who does extra or more difficult tasks.
- Pay your personal assistant correctly and on time.
- Provide other benefits for working with you, for example, extra holidays, support for training and qualifications and flexible working.

“I always thank them before they leave for their help and apologise if I’ve been short at any point with frustration.”

“Value them. Listen to their opinions. Make them feel part of the family. Get to know them. Reward their loyalty.”

Be flexible

You should try and be as flexible as you can with your personal assistant's needs and preferences for working hours, so long as your needs are met. Make sure that your personal assistant does not feel the need to work longer hours than necessary.

“Ultimately you want happy staff, so be reasonable, be kind, be flexible. For example, to calculate a start time I asked my personal assistant to take her son to school then come to work - how simple is that?”

Support your personal assistant to learn and develop

A good induction, regular supervision and opportunities for training can help you to support and keep your personal assistant. There is a section in this booklet about learning and development.

Imagine yourself in their position

Think about what you are asking your personal assistant to do and make sure that it does not cause them any undue stress. If it does, think together about different ways of doing things.

Your home is your personal assistant's workplace, and working conditions are as important to your personal assistant as living conditions are to you.

Make sure that your personal assistant has everything that they need to do their work, and to do it well. You may need to consider training your personal assistant in any specialist areas to fit your requirements.

Have good communication

Communication is about passing on information, developing understanding and building relationships. Crucially, it is more about listening than talking.

As part of their induction, you need to tell your personal assistant about:

- your preferred methods of communication
- if they need to make use of interpreters, equipment or visual aids
- when to seek guidance from your family or other people that know you well.

You may need to think about training for your personal assistant to develop the necessary communication skills. You should not employ a personal assistant unless you, and they, are confident that you can understand each other, or will be able to after training or instruction. You can apply for funding to pay for training at www.skillsforcare.org.uk/IEfunding.

Where possible, try to make sure that small matters that may be causing problems are dealt with as early as possible. This will stop them escalating into a bigger problem.

Set clear boundaries

Your relationship with your personal assistant may not be like more formal employer/employee relationships. Sometimes, personal assistants can end up feeling more like friends than employees.

This can be a good thing as it means that there is a bit more 'give and take' on both sides. But it can also mean that if things go wrong, for example, if your personal assistant lets you down or they feel exploited, the informality of the relationship may make it more difficult to deal with.

When you employ a personal assistant, think about where the boundaries in your relationship are. Think about how you will make this clear, and how you will deal with it if the boundaries are over-stepped. This is a good thing to talk about in induction and supervision.

“I have tried really hard to make working with me and in and around my home a pleasant environment and have maintained a simple working relationship with both [personal assistants].”

Looking after your money

You should also set clear boundaries about looking after your money and savings. Here are some tips to help.

- Ask your personal assistant to keep receipts when they do shopping for you.
- Be clear and precise about where and how to pay your bills. Not everybody has dealt with household finances before.
- It may be useful to keep a small sum available, for example £20, that your personal assistant can access if they need to buy any items or pay small bills, such as a window cleaner.
- If you need your personal assistant to have access to your money, set up a separate bank account and only pay in the amount that you want them to access.

There are some things that you should not do, including:

- never lend money to your personal assistant
- never borrow money from your personal assistant
- do not ask your personal assistant to use their money to shop for you
- do not leave money around the house, other than that you want your personal assistant to access
- do not reveal your bank PIN number to anybody that is not authorised
- do not allow your personal assistant to become a signatory on your bank or building society account
- never advance your personal assistant's wages
- never get involved with your personal assistant's financial affairs
- personal assistants should never become the person who signs financial documents on your behalf (appointee).

Charley's story



Charley is an individual employer and employs a team of six personal assistants to support her with her everyday care needs.

She takes an open approach to managing her team of personal assistants – she ensures that they can voice their opinions and concerns in one-to-one meetings and has an anonymous suggestion box. She regularly communicates with her team through a weekly email, monthly supervisions and quarterly appraisals.

As well as discussing their own role, Charley asks for regular feedback about herself as an employer. This encourages her and her team to continuously improve.

She welcomes her personal assistants to talk about any personal problems that might impact their work, whilst keeping a professional relationship. She says:

“I do not go over boundaries but I do help my staff when they need it, as I know that if personal problems arise this can affect work.”

Her personal assistants admire this approach and it helps them to perform better in their role. One of them said:

“Knowing she is there to talk to allows us to deal with all problems and move forward in a positive way. Knowing that your employer cares boosts moral and encourages us to go that extra mile for her, as she does for us.”

Charley prioritises that her staff are treated fairly. One personal assistant said:

“She fights incredibly hard to keep the care hours high enough to meet her care needs, whilst allowing the appropriate workload, without over working us.”

She is also committed to providing them with a good hourly wage, weekend rate and annual leave entitlement.

Charley strongly believes in looking after her team of personal assistants and shows that she values and appreciates them. When they have done a good job or go the extra mile, she sends them a 'thank you' card or an appreciation email. They also run an 'employee of the month' scheme, go on day trips and have a Christmas party where everyone gets an award for their hard work. One of her personal assistants said:

“She tries hard to keep work fun and always thanks us for doing a good job.”

From experience, Charley knows that making her personal assistants feel valued means that they are more likely to stay working with her.

“Allowing them to talk to me about their personal problems and being flexible with rota changes makes staff feel appreciated, and this means they will go above and beyond for us.

“... I know that employee appreciation from an employer boosts morale and keeps my rota and business going.”

Training and qualifications

It is important that your personal assistant has the training that they need, to be able to work for you. This will make sure that they can be good at their job, work safely with you, and it will motivate them and develop their confidence.

If you have a care plan in place, you should think about what training your personal assistant needs to meet that plan. This should include any clinical responsibilities that they have.

You should talk about training during induction and supervision. You could record what they need to learn on a training needs form – you can download a sample form from our website at www.skillsforcare.org.uk/templates.

Training topics might include:

- moving and handling
- food hygiene
- emergency first aid
- communication skills
- personal resilience
- infection control.

Your personal assistant could also do more formal training where they gain a qualification.

Your social care or health direct payment adviser, local support organisation or the organisation that provides any funding you receive will be able to help you to find a suitable training course and learning provider.

Keep a record of any training that your personal assistant does, and ask for a copy of the certificate if they have one.

You can apply for funding to pay for training from Skills for Care. Find out more at www.skillsforcare.org.uk/IEfunding.

More information

A practical guide to learning and development for personal assistants (Skills for Care)

This guide will help individual employers to plan learning and development for their personal assistants.

Download from www.skillsforcare.org.uk/PALearning



Training for you, as an employer

You might also want to do some training to help you to be a better employer, particularly if you are new to employing staff.

Training topics might include:

- recruitment and selection
- being a good boss
- employment law
- managing and supervising
- record keeping.

Your social care or health direct payment adviser, local authority or local support organisation may be able to help you find training in your local area. Personal Health Budget holders should ask their Clinical Commissioning Group (CCG) about available training.

You can apply for funding to pay for training from Skills for Care. Find out more at www.skillsforcare.org.uk/IEfunding.

Christina's story



Christina has been employing personal assistants for 18 years and likes to be involved in every aspect of her care and support, to ensure that it is tailored around what she wants and needs - and she has a committed team that enables her to do this.

Christina works with Surrey Independent Living Council's (SILC) Training Team to do a 'learning needs analysis', which identifies what learning and development her personal assistants need.

Most of the training is delivered in-house and face to face so that it can be tailored to Christina's individual needs and they can discuss it as a team. They have done lots of training, including person-centred care, dignity and respect, safeguarding, moving and positioning, pressure ulcer care and communication.

In particular, having bespoke training around moving and positioning has had a positive impact on Christina's everyday life – she and her personal assistants are much more aware of how to protect themselves and others.

With the help of SILC's training, Christina applied for Skills for Care's individual employer fund, to pay for her team to do this training.

“Without the funding from Skills for Care, none of this learning would have taken place or can take place in the future”

“I encourage all individual employers to find a good learning provider who will listen to their individual needs, and then apply for funding through Skills for Care.”

Funding for training and qualifications

Individual employers can apply for money from Skills for Care to pay for training for you and/or your personal assistant(s).

The funding can cover the direct costs of training and qualifications, travel costs and the cost of hiring replacement support whilst your usual personal assistant is attending training.

You can apply for money to pay for lots of different training and qualifications including:

- moving and assistance
- first aid
- communication
- dementia awareness
- risk assessment
- health and social care qualifications.

Find out more and download an application form at www.skillsforcare.org.uk/IEfunding.

Apprenticeships

An apprenticeship is a combination of on and off-the-job training and learning, that leads to nationally recognised qualifications. It is another way for your personal assistant to complete training.

They are open to people of all ages, and are not just for new staff – an experienced personal assistant that is already working for you can also do one. They usually last between one and two years.

There are different levels of apprenticeships, depending on the role and responsibilities of your personal assistant:

- Adult care worker (equivalent to level 2)
- Lead Adult Care Worker (level 3)
- Lead Practitioner in Adult Care (level 4)
- Leader in Adult Care (level 5)

Find out more about apprenticeships at www.skillsforcare.org.uk/apprenticeships.

At the end of the apprenticeship, the learner will complete an assessment. This is carried out by an independent assessor. You can find an organisation to carry out this assessment at www.gov.uk/government/publications/register-of-apprentice-assessment-organisations.

Funding for apprenticeships

Big organisations now pay a levy (a kind of tax) to cover the costs of apprenticeships.

As an individual employer, it is likely that you would only be asked to pay 5% of the cost of training (if started after 1 April 2019). You can ask for money to cover this cost through Skills for Care's individual employer fund. The remaining 95% of the cost of the training will be paid by the Government.

You should speak to your learning provider about arranging payments, accessing funding and whether you need to use the Apprenticeship Service (AS).

Find out more about apprenticeship funding on the Government website at www.gov.uk/government/publications/apprenticeship-levy-how-it-will-work/apprenticeship-levy-how-it-will-work.

