



**Employing, Supporting and  
Retaining  
your Personal Assistant  
A Workshop Series for People with  
Disabilities**



This curriculum adapted for

*AR Hands that Care*

Funded by  
The Direct Service  
Community Workforce Grant

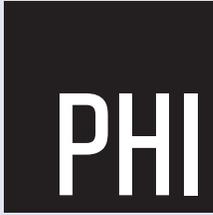
# **Employing, Supporting, and Retaining Your Personal Assistant**

**A workshop series for  
people with disabilities**



Funding for the development of this curriculum was provided  
by Centers for Medicare and Medicaid Services (CMS)

Distributed by Direct Service Workers—AR Hands That Care



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PHI's program activities include developing innovative approaches to recruitment, training, and supervision; client-centered care giving practices; and effective public policy. PHI is leading the national Health Care for Health Care Workers campaign to expand health coverage for direct-care workers. PHI also staffs the National Clearinghouse on the Direct Care Workforce ([www.directcareclearinghouse.org](http://www.directcareclearinghouse.org)), a central on-line library of news, research, best practices, and other information for people working to solve the direct-care staffing crisis in long-term care.

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# Employing, Supporting, and Retaining Your Personal Assistant

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## Acknowledgments

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# Introduction

## The Need for This Curriculum

For decades, people with disabilities have struggled to overcome the assumption that they are patients needing care, rather than persons simply requiring assistance to live full and independent lives. One result of this struggle has been a shift in the way services are conceptualized and delivered. The medical model of patient care, in which all services are delivered under the expert care of licensed medical staff, is being replaced by a social model in which the expert is the consumer who is in charge of directing his or her own support services.

The kinds of assistance people need to live in the community vary but may include help with activities of daily living such as bathing, dressing, transferring from one position to another, using the toilet, and eating, or may focus on instrumental activities of daily living such as housekeeping, meal preparation, shopping, or laundry. These *personal assistance services* may be delivered through an agency, or consumers may hire and supervise personal assistants (PAs) directly. This consumer-directed model is becoming increasingly popular, particularly among young adults who want greater independence and control over their lives.

Although consumer-directed assistance is appealing to many people with disabilities, most have little or no experience as employers. This curriculum is intended to (a) familiarize participants with the consumer-directed model of personal assistance services; (b) introduce the steps involved in recruiting and hiring PAs; and (c) develop and strengthen the supervisory skills participants need to direct their own care and support and retain their PAs.

Being an employer is challenging in and of itself, but with consumer-directed services, a person with a disability is the consumer, employer, and supervisor. The integration of these three roles in a single individual makes consumer-directed services particularly complex; success requires a high degree of self-awareness as well as excellent interpersonal and communication skills. By attending one or more of the workshops in this series, consumers will be better able to sort out each of these critical roles, communicate more effectively, manage their emotional responses to difficult situations, and build positive relationships with their PAs.

# **Workshop I: Introduction to the Consumer-Directed Model**

**Module 1: Understanding the Consumer-Directed Option**

**Module 2: Getting Started: Exploring Needs and Preferences**



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### Curriculum Goal

After completing this training, participants will be able to find, support, and effectively supervise personal assistance staff, and as a result, retain such staff over time.

### Curriculum Objectives

After completing this training, participants will be able to:

- Describe the consumer-directed model and the rights and responsibilities that go with consumer-directed services.
- Identify their personal assistance needs and preferences.
- Place ads, screen, interview, and hire PAs who best match and support their needs and preferences.
- Communicate using active listening techniques, including asking open-ended questions and paraphrasing.
- Effectively supervise and support PAs, and manage challenging conversations and situations.

### Target Audience and Settings

The interactive approach of this curriculum suggests that the minimum number of training participants should be five and the maximum twelve.

Consumers who will benefit from this curriculum include those who:

- Receive agency services and *are actively exploring* the consumer-directed option.
- Have been approved for consumer-directed service and *are actively seeking employees*.
- Have *begun to direct* their own services.

These three types of consumers have varying experiences with consumer-directed services, so their needs will be different. In addition, some consumers will be younger people (under 65) directing their own care, others may be older consumers, and still others may be family or friends directing care on behalf of someone needing services. Accordingly, the seven training modules that comprise this curriculum can be structured as a single course or as three stand-alone workshops targeting the needs of different audiences (see Structure, below). The curriculum can be used in a variety of settings, such as independent living centers, fiscal intermediaries providing program oversight, managed long-term care programs, and Alzheimer support centers.

## Structure

The curriculum is divided into seven training modules:

- **Module 1: Understanding the Consumer-Directed Option** helps participants explore the concepts of choice and preference and rights and responsibilities in obtaining personal assistance services for themselves.
- **Module 2: Getting Started: Exploring Needs and Preferences** increases consumers' self-awareness of their personal assistance needs and preferences, in order to help them screen, hire, and supervise PAs more effectively.
- **Module 3: Finding Personal Assistant Candidates** develops the knowledge and skills trainees need to find appropriate candidates that will be able to meet their personal assistance needs and preferences.
- **Module 4: Preparing to Staff** gives participants the opportunity to develop a staffing plan and Personal Assistance schedule and to improve their interviewing skills.
- **Module 5: Hiring Personal Assistants** takes participants through the process of making an offer to the best candidate and turning down those who are not suitable for a specific position. This module also provides an overview of the consumer-directed program requirements.
- **Module 6: Introduction to Basic Supervisory Skills: Active Listening** introduces the role of supervision in the consumer-directed model and begins the process of developing basic supervisory skills by focusing on active listening.
- **Module 7: Supervisory Skills II: Self-Awareness, Self-Management, and Constructive Feedback** develops key skills essential to being an effective supervisor.

Consumers who are exploring the consumer-directed model or just beginning to direct their own care may be interested in taking all seven modules as a single course. Others, with more experience, may want to focus on specific skills such as recruiting and hiring assistants, or supervising their existing staff. To accommodate these varying needs, the curriculum can be structured as three stand-alone workshops:

- **Workshop I: Introduction to the Consumer-Directed Model**—Modules 1 & 2 (5 hours):  
This component is primarily designed for those actively exploring the consumer-directed option. It is designed to help participants gain a clearer understanding of what is involved in order to decide whether to pursue this option for themselves.
- **Workshop II: Finding & Hiring Personal Assistants**—Modules 3, 4 & 5 (10.5 hours).  
This workshop is for consumers who have already decided to use the consumer-directed option and are ready to advertise and hire PAs. In addition, consumers with some hiring experience who want to improve their knowledge and skills in this area can benefit from this workshop.
- **Workshop III: Supervising Personal Assistants**—Module 6 & 7 (7.5 hours).  
This workshop is for consumers who have already hired PAs. The focus is on improving participants' communication skills so they are able to more effectively supervise their PAs.

Keep in mind that each workshop is not limited to only the consumers described above. People considering the consumer-directed option may want to learn about hiring and supervising before making a final decision. And those already supervising PAs can benefit from the skills practice in the earlier modules.

Since the modules are designed sequentially, the activities build on one another. Workshops 2 & 3 require participants to have completed certain prior activities. Instructions for integrating these into the workshop schedule are provided.

### Timing

Regardless of the backgrounds of participants in each workshop, we recommend that instructors teach only one module per day, and that training sessions be spread out over several days or even weeks. Field tests showed that each module requires participants to expend significant physical and mental energy, and that most were unable to remain engaged beyond a few hours. In addition, the logistics of scheduling and transporting participants with limited mobility can be complex, putting additional strain on the training organization.

### Instructors and Training Methods

The overall training approach in this curriculum is highly interactive and learner-centered. A number of participatory training methods—large- and small-group exercises, paired activities, interactive discussions, and role plays, among other activities—are used. This approach was found to be highly successful in the field tests of this curriculum.

For this approach to be most effective, we recommend a team of at least two instructors—experienced adult educators, social workers with group experience, home care agency staff, along with consumers with disabilities—present the workshops. It is particularly important to have at least one of the instructors be someone who has personal experience with a disability, and that the training team be skilled in interactive, participatory training techniques. At least one instructor needs to be comfortable with performing and conducting role plays.

### Overall Training Tips

- **Respect for privacy and individual differences:** The interactive approach of this curriculum involves a lot of personal sharing. Participants should feel free to control the amount of detail they provide—some will share a great deal, others only a little. Instructors will also encounter individual differences in the pace of learning.
- **Room setup, comfort, and time:** To maximize interaction and participation, instructors must take into account mobility and comfort issues when selecting a space and planning the training activities. Rooms must allow free movement of wheelchairs for pairings and other active techniques. Small-group work and large-group exercises that involve movement will require time for people to move around.
  - Participants should be reminded to ask for help if they need it to move around the room or get what they need.

- Controlling the room's temperature is very important, since some consumers' disabilities increase their sensitivity to temperature.
- Some participants may tire from sitting in chairs or wheelchairs for extended periods or may be mentally exhausted from the intensity of the curriculum. Long breaks are a good idea. Also instructors should remain flexible, making decisions, when appropriate, to end the workshop or activity early and resume at the same point when the group meets again. We recommend no more than five hours of training per day, including lunch and other breaks.
- **Physical, Cognitive, and Learning Disabilities:** These types of disabilities may reveal themselves in the course of the training. This is especially true for reading- and writing-based activities. Instructors will need to make spontaneous decisions about the time to be spent on a given activity, the amount or depth of content to be taught, and the amount of verbal explaining and rereading necessary to ensure adequate learning by participants. For example, small-group work that requires writing may need to be changed to large-group work with an instructor writing on a flip chart page.
- **Homework Activities:** Homework is sometimes assigned to reinforce knowledge and skills or to prepare participants for the next session. Written homework can generate anxiety for participants with learning disabilities. Instructors should be prepared to provide alternate ways to complete assignments—such as small-group work with instructors or a discussion—that are not based exclusively on reading and writing.
- **Time-Saver Tips:** When time is running short, activities such as opinion polls, which are introductory conversational stimuli, can be omitted. This can save 20 to 30 minutes of attitude exploration before delving into a topic.

## The Training Package

This instructor's manual consists of this introduction, an overview of each module, a detailed curriculum with activity guides, handouts, and a selection of overheads (for optional use). In addition, class notes from the train-the-trainer course are included with each module. On the CD you will find eight folders: seven module folders include the instructor's guide, handouts, and optional presentation materials for the module; an overview folder includes the Introduction and Curriculum Overview that apply across the curriculum.

Each of the seven modules has a summary page describing:

- Goal of the module
- Training methods and time for each activity
- Supplies and handouts needed
- Advance preparation that will help make the training run more smoothly

Detailed guides for each of the training activities follow the summary page. Each activity guide is composed of:

- Learning Outcomes
- Key Content

## Introduction

- Teaching Steps
- Teaching Tips (as needed)
- Teaching Options (as needed)

**Learning outcomes** are concrete, measurable behaviors that the participants should have adopted or be able to demonstrate by the end of an activity. These give the instructor a sense of why each activity is important and provide a basis for feedback regarding the effectiveness of the curriculum and the training.

**Key content** is the basic ideas and important points to be covered during the activity. *This information is not to be read to participants* but rather should be worked into discussions as the activity unfolds. If necessary, the instructor can summarize these points at the end of the activity—but, again, they should not be simply read aloud.

**Teaching steps** are guides to help the instructor logically move through each activity. A time estimate is provided for each activity and its parts, and when activities involve many steps or several different training methods (e.g., small-group work followed by large-group discussion), an estimate is suggested for each training step. However, instructors should also be mindful of the needs and interests of participants and adapt both the steps and the time required to meet those needs.

**Teaching tips** are based on experiences with field-testing this curriculum and provide suggestions for optimizing particular training steps. **Teaching options** are alternatives to suggested activities, often related to group size or time issues.

## Teaching Materials, Supplies, and Equipment

This training requires a flip chart pad, easel, colored markers, masking tape, pens or pencils, handouts and extra blank paper for participants, and nametags. Instructors may also want either an overhead or an LCD projector. The Optional Presentation Materials folder with each module provides some additional overheads/slides, but handouts can also easily be converted to overheads. Each activity guide indicates where flip charts or other visual materials should be used.

Visual aids are important to all trainings. They help to focus participants' attention and make the training more engaging. When using visual aids, whether flip charts, overheads, or handouts, keep in mind the following:

- **Write large:** Printing on flip chart pages should be large and clear. Likewise, with typed overheads, the Arial font at a minimum size of 14 points is recommended. In field tests, many participants had difficulty seeing type smaller than 14 point when projected on a screen.
- **Provide handouts:** All presentation materials, including handouts, are in the back section of the curriculum. If new handouts are created, it is best to keep each page simple (lots of white space) and to use large fonts.
- **Build a resource guide:** One desired outcome of the training is for each consumer to build a resource guide. Every participant should have a three-ring binder to keep materials for future reference. Only the handout(s) for a particular activity should be distributed during a session so that participants build their resource guides over time.

## Evaluation and Follow-Up

During the workshop, it is important to regularly check with participants about key issues such as their comfort and energy levels, their comprehension of the information being discussed or presented, and its relevance to participants' needs. This can be done through ongoing verbal check-ins (e.g., *How is everyone feeling? Do we need a break now?*). Also, at the end of each day, instructors should conduct a quick activity to assess participants' reactions to the materials and approaches. A final closing activity with a simple evaluation is included with each module's activity guide.

In terms of evaluating the impact and effectiveness of this curriculum, the key mechanism is following up with participants, to see how successful they are in employing and supervising their PAs. It is important to follow up after each workshop to assess who is ready for the next one or what additional input or assistance consumers might need to carry out key tasks.

Follow-up need not be limited to continuing the training nor does it end when the three workshops are completed. One striking recommendation from the field tests was for ongoing support groups where participants could continue to share lessons from their own experiences and address challenges.

### Feedback

PHI would appreciate your feedback on this curriculum. Please contact Carin Tinney, Training & Curriculum Development Specialist, [ctinney@PHInational.org](mailto:ctinney@PHInational.org) with comments or questions.

## Employing, Supporting and Retaining Your Personal Assistant Workshop Series Overview

### Workshop I: Introduction to the Consumer-Directed Model

#### Module 1: Understanding the Consumer-Directed Option

**Goal:** To help participants explore the concepts of choice, preference, rights, and responsibilities in obtaining personal assistance services for themselves.

**Time:** 2 hrs, 30 min, plus breaks

Activities	Teaching Methods	Time
1.1 Welcome	Large-group exercise	15 minutes
1.2 My Ideal (or Perfect) Day	Discussion	45 minutes
1.3 Opinion Poll 1	Large-group exercise	20 minutes
1.4 Advantages and Disadvantages of Consumer-Directed vs. Agency Model	Small-group brainstorming, discussion	30 minutes
1.5 Consumer-Directed vs. Agency Model: Rights and Responsibilities	Discussion	30 minutes
1.6 Closing	Discussion	10 minutes

#### Module 2: Getting Started: Exploring Needs and Preferences

**Goal:** To increase consumers' self-awareness of their personal assistance needs and preferences in order to help them effectively screen, hire, and supervise their personal assistants (PAs).

**Time:** 2 hrs, 30 min, plus breaks

Activities	Teaching Methods	Time
2.1 Welcome	Discussion	10 minutes
2.2 Opinion Poll 2	Large-group exercise	20 minutes
2.3 The Ideal (or Perfect) Personal Assistant	Large-group exercise	30 minutes
2.4 Assessment Tools for Personal Preferences and Personal Assistance Planning	Large-group exercise	60 minutes
2.5 Opinion Poll 3	Large-group exercise	20 minutes
2.6 Closing	Large-group exercise	10 minutes

## Workshop II: Finding & Hiring Personal Assistants

### Module 3: Finding Personal Assistant Candidates

**Goal:** To increase participants' knowledge and skill in recruiting and pre-screening personal assistance staff, prior to beginning the interview process.

**Time:** 4 hours, plus breaks

Activities	Teaching Methods	Time
3.1 Welcome	Large-group exercise	15 minutes
3.2 Opinion Poll 4	Large-group exercise	20 minutes
3.3 Overview of the Hiring Process	Interactive presentation	20 minutes
3.4 Snapshot of Me: Reviewing Needs & Preferences	Pairs work, discussion	60 minutes
3.5 Finding Personal Assistant Candidates	Discussion	20 minutes
3.6 Creating an Advertisement	Discussion, pairs work	45 minutes
3.7 Telephone Pre-screening	Large-group exercise, discussion	45 minutes
3.8 Closing	Discussion	15 minutes

### Module 4: Preparing to Staff: Making a Staffing Plan, Developing a PA Schedule, and Interviewing Candidates

**Goal:** To assist participants in determining their staffing needs and in developing the communication skills needed to interview candidates effectively.

**Time:** 3.5 hours, plus breaks

Activities	Teaching Methods	Time
4.1 Welcome & Homework Review	Large-group exercise	30 minutes
4.2 Making a Staffing Plan and PA Schedule	Discussion, individual work	45 minutes
4.3 The Interview Process	Interactive presentation	20 minutes
4.4 Interviewing Skills	Interactive presentation, pairs work, discussion	45 minutes
4.5 Role Play of an Interview	Role play, discussion	60 minutes
4.6 Closing	Discussion	10 minutes

### Workshop II: Finding & Hiring Personal Assistants *continued*

#### Module 5: Hiring Personal Assistants

**Goal:** To provide participants with the knowledge and skills needed to evaluate final candidates, make job offers, and politely turn down those who are not qualified.

**Time:** 3 hours, 15 minutes, plus a break

Activities	Teaching Methods	Time
5.1 Welcome & Homework Review	Discussion	15 minutes
5.2 Checking References	Discussion, pairs work	45 minutes
5.3 Making an Offer	Interactive presentation, pairs work, discussion	30 minutes
5.4 Sealing the Deal: Developing Work Agreements	Discussion, individual work	60 minutes
5.5 Overview of Consumer-Directed Program Requirements	Interactive presentation	30 minutes
5.6 Closing	Discussion	15 minutes

## Workshop III: Supervising Personal Assistants

### Module 6: Introduction to Basic Supervisory Skills: Active Listening

**Goal:** To introduce consumers to the role of supervision in the consumer-directed model, and to help consumers begin developing active listening skills that are essential to effective supervision.

**Time:** 3.5 hours, plus break

Activities	Teaching Methods	Time
6.1 Welcome & Homework Review	Discussion	15 minutes
6.2 Great, Not so Great	Discussion, small-group work	30 minutes
6.3 Responsibilities of Supervisors	Discussion	15 minutes
6.4 Introduction to the Coaching Approach to Supervision	Large-group exercise, discussion	30 minutes
6.5 Active Listening: Nonverbal Listening	Interactive presentation, role play, discussion	30 minutes
6.6 Active Listening: Effective Verbal Communication	Large-group exercise	15 minutes
6.7 Active Listening: Paraphrase and Asking Open-Ended Questions	Interactive presentation, pairs work, discussion	60 minutes
6.8 Closing	Discussion	15 minutes

### Workshop III: Supervising Personal Assistants *continued*

#### Module 7: Supervisory Skills II: Self-Awareness, Self-Management, and Constructive Feedback

**Goal:** To introduce consumers to three basic skills necessary for effective supervision: self-awareness, self-management, and constructive feedback.

**Time:** 3 hours, plus breaks

Activities	Teaching Methods	Time
7.1 Welcome & Homework Review	Discussion	20 minutes
7.2 Awareness of Self and Others in Supervision: Blocks to Listening	Interactive presentation, small-group work, discussion	50 minutes
7.3 Self Management in Supervision: Pulling Back	Role play, discussion, brainstorm, individual work	45 minutes
7.4 Giving Constructive Feedback	Large-group exercise, discussion, pairs work	45 minutes
7.5 Closing	Discussion	20 minutes

**Note:** Instructors may want to add additional time to incorporate a closing celebration.

# **Workshop I: Introduction to the Consumer-Directed Model**

**Module 1: Understanding the Consumer-Directed Option**

**Module 2: Getting Started: Exploring Needs and Preferences**



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# 1

## Module 1

# Understanding the Consumer-Directed Option

### Goal

- To help participants explore the concepts of choice, preference, rights, and responsibilities in obtaining personal assistance services for themselves.

### Time

2 hrs, 30 min, plus breaks

Activities	Teaching Methods	Time
1.1 Welcome	Large-group exercise	15 minutes
1.2 My Ideal (or Perfect) Day	Discussion	45 minutes
1.3 Opinion Poll 1	Large-group exercise	20 minutes
1.4 Advantages and Disadvantages of Consumer-Directed vs. Agency Model	Small-group brainstorming, discussion	30 minutes
1.5 Consumer-Directed vs. Agency Model: Rights and Responsibilities	Discussion	30 minutes
1.6 Closing	Discussion	10 minutes

### Supplies

- Nametags and/or table tents
- Three-ring binders to hold participants' handouts (see Build a Resource Guide in the Introduction)
- Flip chart, easel, markers, tape
- Paper and pens or pencils

## Module 1: Understanding the Consumer-Directed Option

**Note:** An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use overheads, make sure you have the necessary equipment and screen. Some PowerPoint slides are provided on your CD for Modules 1 and 2. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.

### Handouts

- Handout 1: “Workshop Ground Rules”
- Handout 2: “Workshop Goals and Objectives”
- Handout 3: “My Ideal (or Perfect) Day”
- Handout 4: “Consumer-Directed Model: Advantages & Disadvantages”
- Handout 5: “Agency Model: Advantages & Disadvantages”
- Handout 6: “Advantages and Disadvantages of the Two Personal Assistance Models ”
- Handout 8: “Agency Model and Consumer-Directed Model: Some Key Differences”

### Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants’ physical needs.

Review the teaching materials for each activity.

Set up flip chart easel and other equipment, as necessary, for optimum viewing by all participants.

Make copies of all handouts you plan to use for all participants.

#### Activity 1.1 Welcome

Prepare, if you choose, a flip chart page with ground rules for the session. (If you want participants to have the ground rules in their binders, also make copies of Handout 1).

Prepare a flip chart page with the agenda for the day’s activities, including times for lunch and breaks.

Copy and place in participants’ binders, Handout 2, “Workshop Goals and Objectives.”  
Prepare a flip chart with the same text for step 3.

#### Activity 1.2 My Ideal (or Perfect) Day

Prepare a flip chart page of “My Ideal (or Perfect) Day,” as shown in step 1 and make copies of Handout 3 for all participants.

#### Activity 1.3 Opinion Poll 1

Prepare a flip chart page of Opinion Poll 1 as shown in step 3.

If you choose to use placards for this exercise, prepare them in advance (see step 2, Teaching Tip).

### **Activity 1.4 Advantages and Disadvantages of Consumer-Directed vs. Agency Model**

Prepare flip chart pages of two grids “Consumer-Directed Model: Advantages and Disadvantages” and of “Agency Model: Advantages and Disadvantages” as shown in step 2.

Make copies of Handout 4, “Consumer-Directed Model: Advantages and Disadvantages” for half the participants and Handout 5, “Agency Model: Advantages and Disadvantages” for the other half.

Prepare a flip chart page, transparency, or computer file with the summary grid “Advantages and Disadvantages of Two Personal Assistance Models,” as shown in step 4. A sample slide can be found in the PowerPoint folder on the curriculum CD.

Make copies of Handout 6, “Advantages and Disadvantages of Two Personal Assistance Models” for all participants.

### **Activity 1.5 Consumer-Directed vs. Agency Model: Rights and Responsibilities**

Prior to this activity review Handout 8, “Agency Model and the Consumer-Directed Model: Some Key Differences.” The activity’s primary focus is for participants to assign responsibilities to the agency and consumer-directed models. In other words, participants should identify who—the agency or the consumer—is responsible for certain tasks in each model (for example: Who is responsible for supervising a PA?). Make sure you know the Michigan regulations and can fill this grid in accurately.

Make copies of Handout 8, “Agency Model and Consumer-Directed Model: Some Key Differences” for all participants

If you plan to use overhead projection, prepare transparency or computer file of Handout 8, “Agency Model and Consumer-Directed Model: Some Key Differences.”

If you plan to do the alternative activity, prepare a transparency or computer file from Handout 8, “Agency Model and the Consumer-Directed Model: Some Key Differences,” with the grid already filled in.

### **Activity 1.6 Closing**

Prepare a flip chart to record evaluation scores as shown in step 5.

*–Teaching Notes–*

## Activity 1.1 Welcome

15 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

- Describe the goals and objectives of the workshop; and*
- Identify each other by name.*

### Key Content

- **Workshop Goal:** After completing this workshop, participants will have the information they need to make an informed choice about the consumer-directed option.
- **Objectives:** Participants who complete this workshop will be able to:
  - Describe the consumer-directed service model and the rights and responsibilities that go with consumer-directed services;
  - Identify their personal assistance needs and preferences; and
  - Determine if the consumer-directed option is this best option for them.
- This workshop is intended as an orientation for consumers who are considering the consumer-directed option and need to learn more in order to decide whether to proceed in this direction. Two additional workshops provide more in-depth information and skill-building exercises for consumers who are ready to recruit and hire PAs or who are already supervising PAs.

### Activity Steps

#### Large-group exercise

1. Welcome participants. Introduce the instructors. Ensure that everyone is comfortable with the layout and temperature of the room.
2. If you choose, review workshop ground rules (Handout 1) on handouts and/or a flip chart. Emphasize that you want to hold the workshop in a way that illustrates the same values of respect and community that drive the movement for consumer direction.



**Ground Rules**

Create a safe, supportive space:

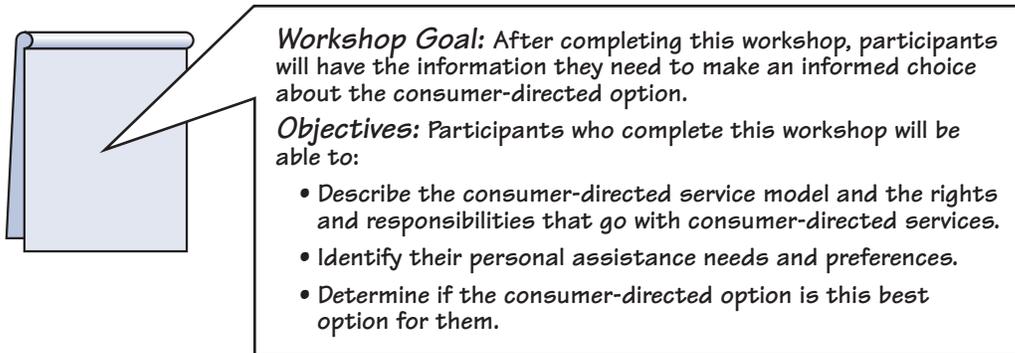
1. Listen for understanding
2. Speak about issues, not individuals
3. Questions are great! None are stupid.
4. Everyone participate, no one dominate
5. No side conversations or cell phones, please.
6. Everyone facilitate, so we stay on track!

– Continued next page

## Module 1: Understanding the Consumer-Directed Option

Activity 1.1, continued

3. Distribute the participants' binders along with the Handout 2, "Workshop Goal and Objectives," and post the flip chart page. Review the handout and encourage questions. If appropriate, explain that this is the first in a series of workshops, and later workshops focus on building skills to recruit, hire, and supervise workers.



**Workshop Goal:** After completing this workshop, participants will have the information they need to make an informed choice about the consumer-directed option.

**Objectives:** Participants who complete this workshop will be able to:

- Describe the consumer-directed service model and the rights and responsibilities that go with consumer-directed services.
- Identify their personal assistance needs and preferences.
- Determine if the consumer-directed option is this best option for them.

4. Post the flip chart agenda for the day's activities in the front of the room. Review and agree on the timing of breaks and lunch. Address concerns about logistics or space.



Agenda	
Welcome	9:00–9:15
My Ideal (or Perfect) Day	9:15–10:00
Opinion Poll 1	10:00–10:20
Break	10:20–10:35
Advantages and Disadvantages	10:35–11:05
Rights and Responsibilities	11:05–11:35
Closing	11:35–11:45

5. Ask participants to introduce themselves. If people do not already know one another, ask them to say how long they have been interested in directing their own services and to share something they'd like the group to know about them. Note that the style of this workshop is very participatory and interactive. Everyone will have opportunities to share their thoughts, feelings, and experiences, but participants will not be forced to speak.

### ► Teaching Tip

If time allows, consider an icebreaker activity that will loosen up the group and begin building connections between participants. See Appendix for a list of resources.

## Activity 1.2 My Ideal (or Perfect) Day 45 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Describe the support they need from personal assistants (PAs) to live independent and full lives.*

### Key Content

- For a person to lead the life she or he wants, it is important to imagine what it would look like.
- By identifying the support they need and seeking out that support, it is possible for people with disabilities to live independent and full lives.

### Activity Steps

#### Discussion

1. Display the prepared flip chart page “My Ideal (or Perfect) Day.” (You may also want to provide participants with Handout 3).



2. Ask participants to think about the life they want to live, now and in the future. Read the two bullets (or ask for a volunteer to read) aloud:

- *Describe what your ideal day would look like.*
- *What would need to happen for that ideal day to be a reality?*

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## Module 1: Understanding the Consumer-Directed Option

Activity 1.2, continued

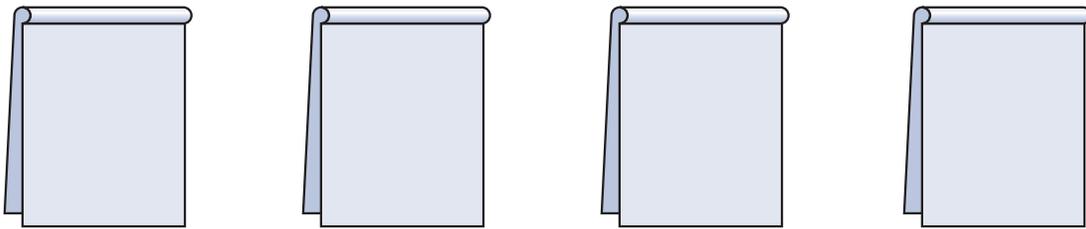
### 3. Before participants answer, explain:

*Each of you will have a few minutes to share your thoughts about these questions, and your thoughts and ideas will be noted on a flip chart page for you to refer to later as you begin to explore your support needs and preferences. (If using Handout 3, ask participants to jot their ideas down on their handouts.)*

*Each of you should consider these issues for yourself only in order to make decisions and choices about how you want to receive personal assistance services.*

*It is important to think about your ideal (or perfect) day, in order to make choices that will help make your vision a reality.*

### 4. Ask for a volunteer to begin. Allow three to five minutes for each participant to respond. Write each participant's name on a separate flip chart page, and record his or her responses.



### 5. Thank each one after he or she has finished, and thank all participants at the end.

#### ► Teaching Tips and Options

If your participants respond more to the word “perfect,” use it rather than the word “ideal.”

Strongly encourage all participants to respond. Explain that they will need to do this kind of sharing when they look for and hire PAs. For instance, when interviewing candidates, they will need to explain their needs and preferences. This activity is good practice.

Have participants work in pairs or small groups to develop their answers before the full group discussion. They can jot their ideas down on Handout 3, “My Ideal (or Perfect) Day.”

To increase participants’ input, ask open-ended questions such as those on Handout 3: What would you do? *Where would you go? What would need to be in place for that activity to occur?*

Some people may “leave their disability at the door”—that’s okay. Allow them to fantasize a little about life without disability, but also ask them further questions (if appropriate): *Okay—so how could you do that tomorrow? Encourage imagination—If you were rich and could have any services to make it happen, what would those services be?*

If there are more than ten participants, you may want to split them into two groups so that each person has enough time to share his or her thoughts. Each group should have a facilitator to record each person’s ideas on a flip chart page.

## Activity 1.3 Opinion Poll 1

20 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Identify and express their feelings and opinions about agency-coordinated services.*

### Key Content

- This opinion poll (and the others that follow) is intended to generate initial reactions to issues people may feel very strongly about. The goal of all of the opinion polls is to encourage people to speak openly and to be comfortable and accepting when listening to the opinions of others.
- This opinion poll addresses the role of agency-provided services in participants' lives. For many, this issue is likely to be emotionally charged. Some may have decided to participate in this workshop specifically because of negative experiences with agency services. Some may feel angry about the control agencies have over their lives.
- This statement was chosen specifically to allow participants to express those feelings early on in the workshop. It is hoped that, having expressed and found acceptance for those feelings, participants can be more open-minded as they explore whether directing their own services is a good option for them.

### Activity Steps

#### Large-group exercise

1. Give instructions:

*This exercise is intended to make you think about how personal assistance services are provided and how you as individuals feel about that.*

*I will read a statement. Please think about whether you strongly agree with that statement, strongly disagree, or of mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.*

*After you hear the statement, please go to the part of the room that matches your opinion, and then we'll hear from people in each group about why they feel that way.*

2. Identify for participants the three areas of the room where they should move.

#### ► Teaching Tip

If space does not allow participants to move like this, or if participants have mobility challenges, give each participant three differently colored posters—one says “strongly agree,” the second says “strongly disagree,” and the third says, “of mixed opinion.”

**Instructions:** *After you hear the statement, please raise the placard that matches your opinion, and then we'll hear from people about why they feel the way they do.*

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## Module 1: Understanding the Consumer-Directed Option

Activity 1.3, continued

3. Display the prepared flip chart, and read it aloud:



### ► Teaching Tip

This and subsequent opinion polls are intended to elicit participants’ feelings and experiences and to stimulate initial discussions about the topics. The polls also serve as icebreakers for group interaction. Be sure to validate each person’s opinion in a way that allows others to have different feelings and beliefs.

The statement may be a little complicated for some participants. Feel free to simplify the statement. If necessary, read the statement two or three times.

4. Remind participants about the location (or correct color placard) for each group—*strongly agree, strongly disagree, of mixed opinion*. Ask participants to go the location (or raise the placard) that best represents how they feel about the statement.

5. Facilitate dialogue by encouraging everyone in each group to explain his or her opinion. You may want to use a flip chart to record the pros and cons of agency coordination while highlighting that both can be true. To encourage dialogue, ask the following questions:

*Why did you place yourself where you did? What experiences influenced your opinion?*

*What does “mixed” mean to those who made this choice?*

*How difficult was it to take a position? Why was it difficult (or easy)?*

*Does it make sense that different people will feel differently based on their experiences?*

Thank everyone for being candid about their opinions and respectful toward others. Ask:

*What have you learned from having this discussion?*

## Activity 1.4 Advantages and Disadvantages of Consumer-Directed vs. Agency Model 30 minutes

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### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the differences between the consumer-directed and agency-coordinated models and their advantages and disadvantages; and*

*Describe how directing their personal assistance services may or may not better serve their life needs.*

### Key Content

- In this workshop, “choice” refers to consumers selecting the model of personal assistance services that allows them to live their lives (immediate and future) in ways that best match their assistance needs and personal preferences. The two most common models to choose from are consumer-directed (CD) services and agency-coordinated services.
- Each option has advantages and disadvantages. Understanding how each model functions and how it suits the needs and preferences of different consumers is essential to selecting the most suitable model.

### Activity Steps

**Option:** (see Teaching Option on page 1.13 for an alternative method)

#### Small-group brainstorming (15 minutes)

1. Divide participants into two groups. Assign “Consumer-Directed Model” to one group and “Agency Model” to the other.

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## Module 1: Understanding the Consumer-Directed Option

Activity 1.4, continued

2. Provide each group with one of the prepared flip chart grids, and give all participants in each group a corresponding handout (Handouts 4 and 5).

The illustration shows a flip chart with two grids. The top grid is titled "Consumer-Directed Model" and the bottom grid is titled "Agency Model". Both grids have columns for "Advantages" and "Disadvantages".

Consumer-Directed Model	
Advantages	Disadvantages

Agency Model	
Advantages	Disadvantages

3. Ask each group to brainstorm both the advantages and disadvantages of their assigned service model. Remind them that in brainstorming, every idea is accepted—there are no wrong answers or bad ideas. Ask them to identify one person to record and one to report out for the group. Explain that they will have 10 minutes.

### ► Teaching Tips

You may also break into four groups, and have each brainstorm only disadvantages or advantages of their model (consumer-directed or agency).

Encourage group members to help one another record and report, but if necessary, the same person can write and report.

Individuals bring different backgrounds, skills, and experiences to these discussions. Exploring participants' varying perspectives allows everyone to consider advantages and disadvantages of each model that they may not have considered before.

Participants tend to have very strong feelings (generally negative) about the agency model—probably because it is what they know best and it likely did not fully serve their needs. This may be a factor in their considering or already using the consumer-directed model. Like the previous activity, this exercise aims to draw out such feelings so participants can more objectively explore both models.

Instructors need to monitor the small-group discussions to be sure the pros and cons of each model are considered.

**Discussion (15 minutes)**

4. Have each small group share group members’ responses with the whole class.

Consumer-Directed Model		Agency Model	
Advantages	Disadvantages	Advantages	Disadvantages

5. On the prepared double-grid flip chart or overhead/slide, write each group’s responses.

6. After each report, ask if anyone in either group wants to add items to the list. If there are gaps in the list, add your own suggestions (see Handout 6, “Advantages & Disadvantages of Two Personal Assistance Models” and lists generated from class notes). Thank both groups for their work, and distribute Handout 6.

7. Ask participants to summarize what they learned from this activity. Ask:

*What do you see as the greatest strengths and greatest challenges associated with each model?*

*Were there any surprises or things you had not thought about before?*

**► Teaching Option: Large-Group Brainstorming**

Small-group brainstorming followed by large-group discussion is recommended for this activity in order to encourage active input from many participants and to help everyone think about aspects of each model that they may not have previously considered. However, small groups take time to set up and report back. If time is short, participants’ physical or cognitive functioning is limited, or if the groups seem unlikely to complete the small-group activity in 30 minutes, use large-group brainstorming, as follows:

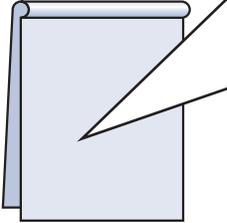
1. Facilitate a brief discussion about participants’ knowledge of and thoughts about the consumer-directed and agency models. Draw out participants’ feelings, experiences, and reactions to both.

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## Module 1: Understanding the Consumer-Directed Option

Activity 1.4, continued

- Using a prepared flip chart page or overhead/slide, display the blank “Advantages and Disadvantages of Two Personal Assistance Models” summary grid:



Consumer-Directed Model		Agency Model	
Advantages	Disadvantages	Advantages	Disadvantages

- Go around the room and ask participants to fill in the grid starting with the left column. Continue seeking input until the group has exhausted its knowledge of each model. Add your own comments, if necessary (see Handout 6, “Advantages & Disadvantages of Two Personal Assistance Models”).
- Ask participants to summarize what they learned from this activity. Ask:  
*What do you see as the greatest strengths and greatest challenges associated with each model?*  
*Were there any surprises or things you had not thought about before?*
- Distribute Handout 6, “Advantages & Disadvantages of Two Personal Assistance Models,” for participant binders.

### –Teaching Notes–

## Activity 1.5 Consumer-Directed vs. Agency Models: Rights and Responsibilities

30 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Explain their rights and responsibilities when choosing the consumer-directed (CD) option.*

### Key Content

- Consumers have distinct rights and specific responsibilities that they must fulfill when employing a personal assistant (PA). Knowing those rights and responsibilities and understanding how they can fulfill their responsibilities as employers are important elements in making an informed choice about the CD option.

### Activity Steps

#### Discussion

**Option:** (see Teaching Option on page 1.16 for an alternative method)

1. Distribute Handout 8, “Agency Model and the Consumer-Directed Model: Some Key Differences.” Ask participants to think about each routine function or area of concern and who has responsibility for it in each of the two models.
2. Go through the form line by line, asking participants to think about who is responsible for the particular function—the consumer or the agency. (If you have a projector, display Handout 8 and write in the correct response as you go.)

#### ► Teaching Tip

When possible, show the link between Activities 1.4 and 1.5. Point out that many of the listed advantages and disadvantages identified in Activity 1.4 can be categorized as a responsibility of one party in each model. For example, one advantage of an agency is that it is responsible for finding back-up or emergency aides, whereas in a consumer-directed model, that responsibility falls on the consumer.

3. After reviewing the form with the group, ask:

*Which model is best?*

#### ► Teaching Tip

The desired response is “the model most suited to meet various individual needs—physical, social, emotional, environmental, medical, etc.—of the particular consumer.”

The best model could be either or both. Ask leading questions to guide the group to that conclusion, if necessary.

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## Module 1: Understanding the Consumer-Directed Option

Activity 1.5, continued

### ► Teaching Option: Presentation and discussion

If time is short, this activity can be conducted as a mini-presentation with brief discussion.

1. Using an overhead or LCD projector, display a slide prepared from Handout 8, "Agency Model and the Consumer-Directed Model: Some Key Differences," with the matrix filled in. Briefly highlight key points from each category, noting the relationship between the advantages and disadvantages (from Activity 1.4) and the consumer's rights and responsibilities.
2. To summarize, ask participants if there were any surprises or if they learned anything new from this comparison.

*—Teaching Notes—*

## Activity 1.6 Closing

10 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

- Identify their comfort level in directing their own PA services; and*
- Know the next steps relevant to this training.*

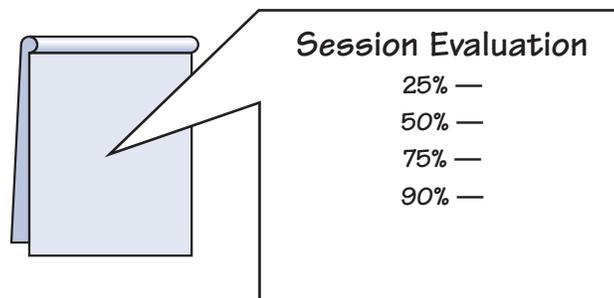
### Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group. In addition, the end of day wrap-up allows participants to share what they learned, providing an informal evaluation for the instructor to determine what parts of the workshop were most useful.

### Activity Steps

#### Discussion

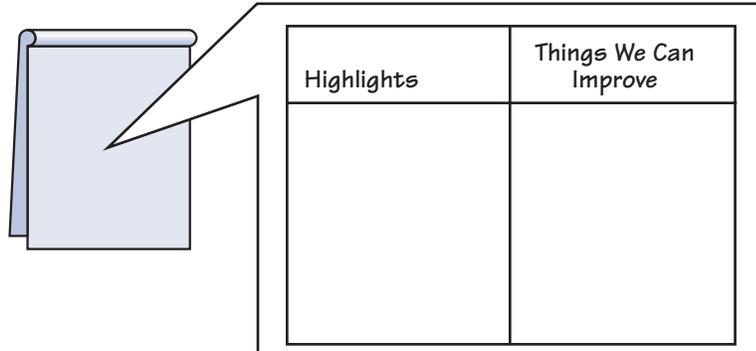
1. Summarize by reviewing what has been covered in Module 1.
2. Ask each participant to name one thing he or she learned about consumer-directed services during today's workshop. (You may want to record responses on a flip chart.)
3. Ask if anyone would like to share how he or she is feeling regarding using consumer-directed services after this introduction.
4. Give each participant the flip chart page of their "Ideal Day." Fold them to fit into the pocket of their notebooks. Note that participants should refer to their vision of their ideal day as they begin to explore their service needs and preferences. That is the focus of the next module in the series. Ask them to bring their flip chart pages to the next session, if they are planning to attend. If they are not planning to attend, they should continue to consider how they can get the support they need to bring their reality closer to their ideal.
5. Conduct a quick evaluation by asking participants, "How much of today was a good use of your time?" Invite them to vote for the percentages you have listed on a prepared flip chart.



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## Module 1: Understanding the Consumer-Directed Option

6. After they've voted and you've recorded the responses (praising those who give lower ranking for their honesty), ask them to tell you what worked really well for them—the highlights, and what they think could be better—the 'low-lights.' Record ALL answers on the flip chart.



Highlights	Things We Can Improve

7. Thank participants who give you critical feedback and emphasize that it will help you make future sessions better for participants.

8. A fun way to draw the session to a close is to call for a motion to adjourn, and invite all who agree that it's time to adjourn to say, "Aye!!"

► **Teaching Tip**

If Module 2 closely follows Module 1, then you may want to keep their "Ideal Day" pages and leave them posted until you meet again.

—Teaching Notes—

# **EMPLOYING, SUPPORTING, AND RETAINING YOUR PERSONAL ASSISTANT**

## **A Workshop Series for People with Disabilities**

### **Handouts**

#### **Workshop I: Module 1 Understanding the Consumer-Directed Option**

# Workshop Ground Rules

## **Create a safe, supportive space:**

1. Listen for understanding
2. Speak about issues, not individuals
3. Questions are great! None are stupid
4. Everyone participate, no one dominate
5. No side conversations or cell phones, please.
6. Everyone facilitate so we stay on track!

# Introduction to the Consumer-Directed Model

## *Goal & Objectives*

### **Goal**

After completing this workshop, participants will have the information they need to make an informed choice about the consumer-directed option.

### **Objectives**

Participants who complete this workshop will be able to:

- ◆ Describe the consumer-directed service model and the rights and responsibilities that go with consumer-directed services.
- ◆ Identify their personal assistance needs and preferences.
- ◆ Determine if the consumer-directed option is the best option for them.

## My Ideal (or Perfect) Day

*Describe what your ideal day would look like.*

Where would you be?

How would the day start?

How many things would you do in a day?

What would you be doing?

Who would you be with?

How and when would the day end?

What would need to happen for that ideal day to be a reality?





## Advantages and Disadvantages of Two Personal Assistance Models

Consumer-Directed		Agency	
Advantages	Disadvantages	Advantages	Disadvantages
Learn more and more empowering for consumers	There is a lack of consumer education on the model	Trained home health aides know what they are doing	Impersonal, non-relational
Consumers and staff are more motivated and committed in this model	Wrong choices- not knowing how to make right choices about staffing	Act professionally and give respect-command respect back	Untrained in the way I want my services
Consumer does more on their own	'Been told I can't do consumer direction'; some consumers discouraged from CD model	Understand the big picture and what needs to be accomplished	Turnover is high-different day, different aide
Easier to end bad matches	Consumers may be Overbearing towards staff	May afford better pay-more money to work with	Less outings
Consumer can communicate needs better	Learning boundaries on part of provider and consumers	Pool of back up staff as needed	Passionless?
Staff understands consumer better	Not understanding legal issues, liability safety	Vacation and sick help	Rules oriented/restrictive
Teach consumers more responsibility	Assumption by some that consumers know what and how to do it- when and fact they may not	Accountability on part of the agency providing services	Too many middle men and women
Budget (may go) goes further	Not knowing background of provider/staff; safety issues	Supervision- PA's are supervised by someone who knows what they are doing	Mismatched caregiver-consumer
Help boost the consumer's self esteem	Limited access to information- new programs, new rules, services; isolation	Well trained	Inflexible
Better control over life (consumer)	Current systems aren't supportive	Relieves consumers of details of being an employer-	Possible low wages and benefits

Consumer-Directed		Agency	
Advantages	Disadvantages	Advantages	Disadvantages
		administrative stuff	
Workers may get paid more	Consumer not able to take charge and express needs	Health insurance for direct care worker's	Repetition leads to burnout
Workers get better schedules- the flexibility and repeatability- predictable	Consumer not knowing how to meet their goals	Access to additional resources/ wheelchair van e.g.	Lack of support
Consumers get along better with staff	Finding staff may be difficult	Stability over time- potentially	Lonely job for the caregivers
Consumers go on more outings	Understanding employment rules- administration	Agency can be the first resort; it is readily available	Bad schedules- for caregiver- 2 hours here; 2 hours there
Leads to better relationship between staff and consumer	Staff may get paid less	Can handle crisis that come up	Agency can interpret rules strictly
Freedom	Staff do not have benefits- health insurance, pension, paid personal days, etc...	Connection and networking	Aides cannot provide help with medical care- suctioning (e.g.); medications; diabetes testing; etc...
		Criminal background checks	
		State regulations- liability	
		freedom	

## Agency Model and the Consumer-Directed Model

### *Some Key Differences*

	<b>Routine Function/ Concern</b>	<b>Agency Model</b>	<b>Consumer- Directed Model</b>
		<i>Responsibility falls on:</i> <small>*When "agency" is the answer in the CD model, it refers to the party that oversees the program or handles the financial responsibilities.</small>	
<b>RECRUIT PAS</b>	Advertise and recruit PAs (including costs)		
	Screen applications and interview candidates		
	Check employment references		
	Hire PAs		
	Calculate yearly salary, weekly pay, and benefits		
	Ensure PA paperwork is in order and submitted		
<b>MANAGE SERVICES</b>	Review and submit PA timesheets		
	Schedule PAs		
	Establish, implement, and manage back-up and emergency plan for when a scheduled PA cannot work or is on vacation		
	Maintain accurate records on PAs; report changes		
	<b>Routine Function/ Concern</b>	<b>Agency Model</b>	<b>Consumer- Directed Model</b>

		<b>Responsibility falls on:</b> <i>*When "agency" is the answer in the CD model, it refers to the party that oversees the program or handles the financial responsibilities.</i>	
<b>OVERSEE FISCAL &amp; LEGAL</b>	Coordinate all matters related to PA taxes and benefits		
	Cover PA work-related injuries or illnesses under the terms and conditions of the Worker's Compensation Policy		
	Pay PAs based on timesheets submitted		
	Ensure PAs have annual TB test and physical exam		
<b>SUPERVISE PAS</b>	Determine which duties PAs will and will not perform		
	Hold supervisory meetings with PAs regularly		
	Determine training needs		
	Provide feedback, evaluation, praise		
	Fire undesirable PAs		

**Other Program-Specific Responsibilities:**

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## Module 2

# Getting Started: Exploring Needs and Preferences

### Goal

- To increase consumers' self-awareness of their personal assistance needs and preferences in order to help them effectively screen, hire, and supervise their personal assistants (PAs).

### Time

2 hrs, 30 min, plus breaks

Activities	Teaching Methods	Time
2.1 Welcome	Discussion	10 minutes
2.2 Opinion Poll 2	Large-group exercise	20 minutes
2.3 The Ideal (or Perfect) Personal Assistant	Large-group exercise	30 minutes
2.4 Assessment Tools for Personal Preferences and Personal Assistance Planning	Large-group exercise	60 minutes
2.5 Opinion Poll 3	Large-group exercise	20 minutes
2.6 Closing	Large-group exercise	10 minutes

### Supplies

- Flip chart, easel, markers, tape
- Paper and pens or pencils
- If using a projection system, be sure to have the necessary equipment ready to use.

### Handouts

- Handout 9: “My Ideal Personal Assistant”
- Handout 10: “Personal Assistance Planning List”
- Handout 11: “Personal Preference Assessment: Mapping Out My Comfort Zone”

### Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants’ physical needs.

Review the teaching materials for each activity.

Set up projector and other equipment, as necessary, for optimum viewing by all participants.

Post Workshop I Goal and Objectives from Module 1. (If this module is not part of the Workshop series, prepare a flip chart with the goal and objectives for this module).

Post participants “Ideal (or Perfect) Day” flip charts, if they were removed after the last session.

#### Activity 2.1 Welcome

Prepare a flip chart with the agenda for the day.

Prepare an ice-breaker to begin the day.

#### Activity 2.2 Opinion Poll 2

Prepare flip chart page with Opinion Poll 2, as shown in step 2.

If you choose to use placards for this exercise, prepare them in advance (see step 2, Teaching Tip).

#### Activity 2.3 The Ideal (or Perfect) Personal Assistant

Prepare a flip chart page of “My Best PA Experience,” as shown in step 1.

Prepare a flip chart page of a stick figure as shown in step 2.

Make copies of Handout 9, “My Ideal Personal Assistant” for all participants.

#### Activity 2.4 Assessment Tools for Personal Preferences and Personal Assistance Planning

Prior to Activity 2.4, carefully review assistance needs identified on the “Personal Assistance Planning List” to be sure that the services you’ve identified will be paid for by the particular program funding participants’ supports. Consumer-directed programs vary, and regulations differ on what a PA can be hired to do. A PA is meant to help an individual function in the community. However, agencies that provide or oversee PA services vary in how they interpret “to help an individual function.”

Make two copies of Handouts 10 and 11, “Personal Assistance Planning List” and “Personal Preference Assessment: Mapping Out My Comfort Zone” for each participant.

If using overhead or LCD projection, prepare transparencies or computer files of Handout 10, “Personal Assistance Planning List” and Handout 11, “Personal Preference Assessment.”

### **Activity 2.5 Opinion Poll 3**

Prepare flip chart page of Opinion Poll 3, as shown in step 2.

If you choose to use placards for this exercise, prepare them in advance (see step 1, Teaching Tip).

### **Activity 2.6 Closing**

Prepare a flip chart page to record evaluation scores as shown in step 3.

*—Teaching Notes—*

*–Teaching Notes–*

## Activity 2.1 Welcome

10 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

- Describe the workshop goal and objectives and the day's agenda; and*
- Identify participants by name.*

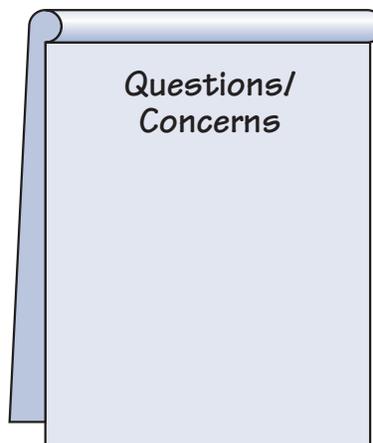
### Key Content

- The focus of this module is exploring support needs and preferences. This is essential to finding personal assistants who will meet consumer's support needs.

### Activity Steps

#### Discussion

1. Welcome participants back to the workshop. If appropriate, ask if anyone has any comments and concerns regarding the last session. Write these on the flip chart to ensure they are attended to as necessary.



#### ► Teaching Tip

If this workshop is *not* part of a series, welcome participants and use an icebreaker that will allow everyone to introduce themselves and begin building relationships with one another. Explain that this will be a participatory workshop and everyone will be encouraged to share their thoughts, feelings, and experiences.

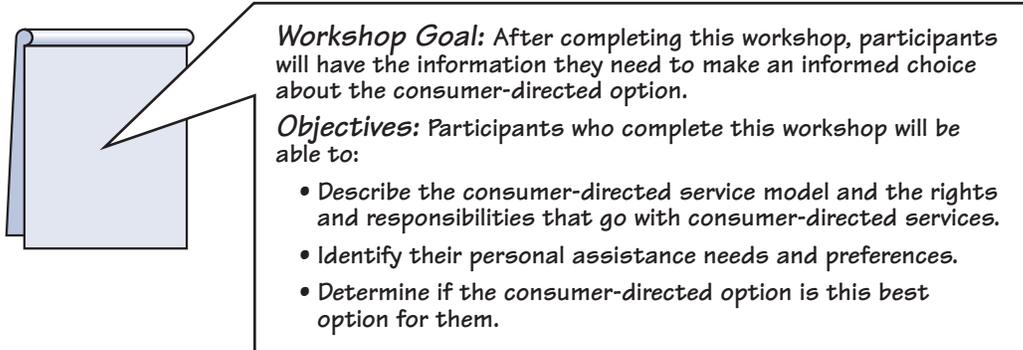
If this workshop *is* part of the series, and participants already know one another, consider an ice-breaker to energize participants and prepare them for the day.

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## Module 2: Getting Started: Exploring Needs and Preferences

Activity 2.1, continued

2. Referring to the prepared flip chart from Module 1, review the goal and objectives for the workshop. Note what was covered in Module 1 and explain that today's session will focus specifically on identifying their individual support needs and preferences in relation to PA services. Ensure that everyone is comfortable with the layout and temperature of the room.



**Workshop Goal:** After completing this workshop, participants will have the information they need to make an informed choice about the consumer-directed option.

**Objectives:** Participants who complete this workshop will be able to:

- Describe the consumer-directed service model and the rights and responsibilities that go with consumer-directed services.
- Identify their personal assistance needs and preferences.
- Determine if the consumer-directed option is this best option for them.

3. Using a prepared flip chart with the Day's Agenda, note the highlights, including break times.



<b>Agenda</b>	
Welcome	9:00–9:10
Opinion Poll 2	9:10–9:30
The Ideal Personal Assistant	9:30–10:00
Break	10:00–10:15
Assessment Tools	10:15–11:15
Opinion Poll 3	11:15–11:35
Closing	11:35–11:45

–Teaching Notes–

## Activity 2.2 Opinion Poll 2

20 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Express their feelings about the concept of “care” vs. “support;” and*

*Describe how strong negative feelings on this issue can be a barrier to hiring and retaining PAs.*

### Key Content

- This activity can trigger strong responses. The words “cared for” are often equated with treating people with disabilities as people who are child-like or sick or incapable of taking care of themselves (i.e., being a diagnosis, not a person). People with disabilities see themselves in need of support services that allow them to lead their lives independently in the community.
- Having strong and unacknowledged feelings about this issue can derail a good assessment process because consumers may identify needs or preferences out of anger and resentment, even though they do not express or perhaps even understand these feelings. One purpose of this activity is to raise participants’ awareness of their emotionally charged opinions so they can better assess their support needs.

### Activity Steps

#### Large-group exercise

1. Designate three different places in the room for participants to move to, based on their opinion: “Strongly Agree,” “Strongly Disagree,” and “Of Mixed Opinion.” Give instructions:

*This opinion poll is intended to help you look at the concept of “care” and what it means to you.*

*I will read a statement. Please think about whether you strongly agree with that statement, strongly disagree, or have a mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.*

*After you hear the statement, please go to the part of the room that matches your opinion, and then we’ll hear from people in each group about why they feel that way.*

#### ► Teaching Tip

If space does not allow participants to move like this, or if participants have mobility challenges, give each participant three differently colored placards—one says “strongly agree,” the second says “strongly disagree,” and the third says, “of mixed opinion.”

Then give instructions:

*After you hear the statement, please raise the placard that matches your opinion, and then we’ll hear from people about why they feel the way they do.*

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## Module 2: Getting Started: Exploring Needs and Preferences

Activity 2.2, continued

2. Using a flip chart, display the opinion poll and read it aloud:



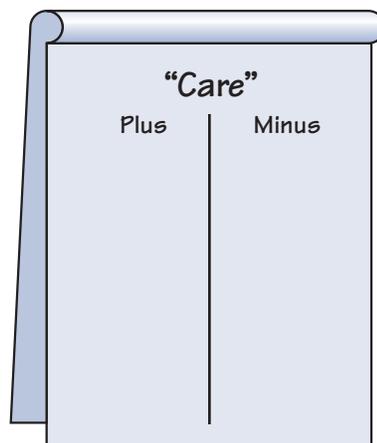
3. Remind participants about the location/correct placard for each group—*strongly agree, strongly disagree, of mixed opinion*. Ask participants to go the location that best represents how they feel about the statement or to raise the placard that best describes their opinion.

4. Facilitate dialogue by encouraging everyone in each group to explain his or her opinion. You may want to record on a flip chart the plusses and minuses of "care" while highlighting that both points of view can be true. Ask:

*What are your reactions to this statement?*

*Why do you think you reacted the way you did to this statement?*

*How do you think your reactions might influence your assessment of your support needs? How about the type of personal assistant you might hire?*



5. Thank participants for being candid about their opinions and respectful toward others. Ask:

*What have you learned from having this discussion?*

## Activity 2.3 The Ideal (or Perfect) Personal Assistant

30 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe their ideal personal assistant (PA)—i.e., the traits or qualities of a personal assistant (PA), including abilities, personality style, and interests, that participants consider most important; and*

*Explain how having an ideal in mind can be helpful in making conscious choices or trade-offs when screening and hiring PA candidates.*

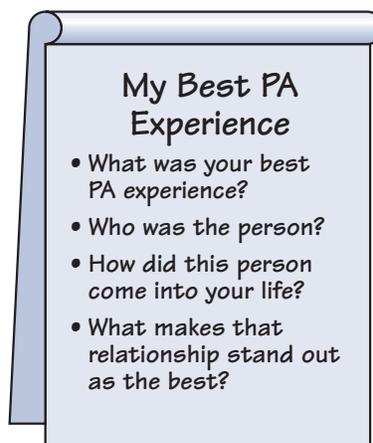
### Key Content

- Articulating the ideal traits and qualities of a personal assistant will help the consumer find personal assistance staff who make a good fit in terms of skills and personality.
- Employer-employee matches are rarely perfect. A goal in recruiting and hiring is to make conscious choices about the PAs being selected—their skills, personality, and interests, and the type of supportive supervision that will ensure that the PA is a successful hire in the long run. Ultimately, the consumer must decide how closely the candidate matches his or her ideal PA and consider what trade-offs will be made in hiring.

### Activity Steps

#### Large-group exercise

1. Display the prepared flip chart “My Best PA Experience:”



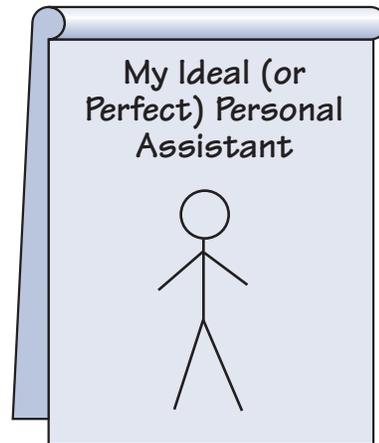
Post this page for participants to refer to as you continue the activity.

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## Module 2: Getting Started: Exploring Needs and Preferences

Activity 2.3, continued

2. Display the prepared flip chart below and distribute Handout 9, “My Ideal (or Perfect) Personal Assistant,” which has the same image.



3. Ask for a volunteer to start the discussion by answering the four questions on the flip chart introduced in Step 1. Explain that as participants talk about their best PA experiences, you will be identifying an associated body part and be labeling the figure to represent the skills and qualities of an ideal PA.

### ► Teaching Tips

Depending on what works for your participants, you can refer to the “ideal” or the “perfect” assistant.

If a participant has not had a good experience to recount, ask what was lacking in the PAs he or she has worked with, and add the qualities the consumer desired to the stick figure as desirable traits.

Depending on the number of people in your workshop, and their comfort level and ability to participate in the large-group discussion, you may have people break into small groups for discussion to prepare for the large-group debrief. You will need to allow an extra 10-15 minutes if you take this approach.

4. Ask participants:

*To help make your perfect day happen, what qualities would your “ideal” or “perfect” PA need?*

*Are all of these qualities represented on the stick figure?*

Add them, if appropriate.

### ► Teaching Option

You may want to distribute copies of “The Perfect Personal Assistant,” which is in the Module 1 folder on the CD. If you choose to distribute this handout, ask participants if they see any additional qualities or skills that they would like to add to the list you’ve been building. You may also ask if there are any skills or qualities they see that surprise them.

5. Explain that just as everyone’s “ideal day” is different, so is his or her “ideal PA.” It’s important to know what kind of person one is looking for, in order to evaluate candidates and make trade-offs. Each participant must identify the skills and qualities that are most important to them—and the skills and qualities that they are willing to let go of—if no potential candidate fits their “ideal.”

► **Teaching Tip**

If time allows, use a flip chart to ask the question:

*If I had to trade-off one of the qualities of an “ideal” personal assistant, it would be \_\_\_\_\_ because \_\_\_\_\_.*

Invite discussion and draw out how different each person’s trade-offs might be and how important it is that each person knows what his or hers are.

6. Thank everyone for their contributions.

—Teaching Notes—

*–Teaching Notes–*

## Activity 2.4 Assessment Tools for Personal Preferences and Personal Assistance Planning

60 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Distinguish their support needs from their preferences; and*

*Begin to see how identifying—and distinguishing between—their own needs and preferences will:*

- *Contribute to finding a PA who comes close to their ideal, and*
- *Help them provide guidance and support to their PAs, so they can come closer to meeting their needs and preferences.*

### Key Content

- One essential responsibility of an employer is screening and hiring. To be most effective in screening and hiring, an employer needs to know not only what has to be done (tasks), but how he or she likes the tasks done (preferences). For example, in hiring a typist, an employer wants to know: *Can the candidate type? How fast? How accurately?* But also it may be important to know if the candidate works well under pressure, is flexible about scheduling if a project needs completion, has a good sense of humor, etc.
- It is unlikely that anyone will find his or her ideal PA. However, this assessment process will allow participants to:
  - Make conscious choices or trade-offs when screening and hiring PA candidates.
  - Determine in which areas PAs who are hired need support and guidance.

### Activity Steps

#### Large-group exercise

1. Note for participants that in previous activities, each of them described their ideal day and ideal PA. Acknowledge that this may be a new concept for participants because:

- Participants may never have been given the opportunity to dream of what they could do with the appropriate supports and may have felt limited by agency services.
- Participants may have interviewed or hired PAs based in large part on the PA's availability or training. Consumers often neglect to factor in their own dreams and preferences when seeking PAs who fit their personality and lifestyle.
- Participants who have experience with the agency model may not have had the opportunity to choose a PA.

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## Module 2: Getting Started: Exploring Needs and Preferences

Activity 2.4, continued

2. Explain that the purpose of this activity is to provide participants with two assessment tools, or checklists, to help them identify their personal assistance needs along with their preferences for how those needs are met. This knowledge will ultimately be used to select a PA who is as close to their ideal as possible and can support them in having more ideal days.

### ► Teaching Tips

This may be the first time some participants have engaged in an assessment of this type. Thus, they may need further orientation to the activity and support for expressing their preferences in concrete ways.

Stress to participants that completing the assessments is not the intended purpose of this activity. The activity is designed to help them understand that expressing preferences is as important as expressing needs when seeking or hiring PAs

3. Distribute two copies of Handout 10, “Personal Assistance Planning List,” to each participant. Explain that this list can help participants determine the type—and timing—of service needs. In addition, explain how this list also acts as a guide to estimate how many PAs are needed (including back-ups) during a typical week. The list may not cover all needs of every participant, so encourage participants to add additional service needs. (If projection equipment is available, also display the “Personal Assistance Planning List” on a screen or blank wall.)

### ► Teaching Tip

It may be helpful to remind participants that when an agency directs a person’s care, home health aides, nurses, certified nurse assistants, PAs, and others develop and follow a “care plan” for delivering services. An agency also sometimes determines the type of care—and how many hours of service—the consumer receives. Explain that in developing a “Personal Assistance Planning List” under the consumer-directed model, participants have an opportunity to determine what works best for them. This is one of the advantages of the consumer-directed model—the consumer has more control over the type of support he or she receives, and when it is delivered.

4. To help participants complete the first planning list, explain that you will read a short biography of Sherry, a fictional consumer needing PA services. Explain that the first task for participants will be to complete the planning list based upon Sherry’s story. Also let participants know that the information in Sherry’s story will be used in future activities.

5. Read aloud:

#### ***SHERRY—A “Pretend” Consumer Who Needs To Hire An Attendant***

*Sherry is a 38-year-old divorced woman with cerebral palsy who lives alone in a Midwest suburb. She’s been a member of a Center for Independent Living program for about a 1½ years, and has been hiring her personal attendants for about 6 months.*

*Sherry uses crutches and sometimes a non-motorized wheelchair to get around. She likes to get out of the house and be active. She sees a social worker two times a month to help with her feelings of depression.*

*Though Sherry likes being able to do her own hiring, she's becoming very frustrated because she can't seem to find "the right one" yet. More than anything, she needs someone who can fix her hair and make-up the way she likes, help her get to all of her appointments on time, and be able to "be there for her" when she's not having a "good day."*

**6.** Ask participants to suggest what Sherry may need for each item on the planning list. Encourage everyone to participate. If projecting the Planning List, add participants' responses to the projected grid.

**7.** After participants have created the planning list for Sherry, tell them that as part of their homework assignment, they will be using the second copy of Handout 10, "Personal Assistance Planning List," to fill in their own needs. Encourage participants to add items to the list that reflect their personal situations.

► **Teaching Tip**

Participants may find this activity challenging. Consider taking a 10-minute break after completing Sherry's "Personal Assistance Planning List."

**8.** When Sherry's planning list is completed, distribute two copies of Handout 11, "Personal Preference Assessment: Mapping Out My Comfort Zone," to each participant. (If you have projection equipment available, display the "Personal Preference Assessment" on a screen or wall where it can be seen by all participants.)

**9.** Explain that this assessment allows participants to explore their personal likes, dislikes, preferences, styles, and needs related to their lifestyle choices, habits, values, and schedules. You may wish to remind participants that this exercise will also help participants shape their PA interviews.

**10.** Remind participants of Sherry's identity, and ask participants to imagine Sherry's preferences for each item on the list. Go through each section of the assessment, and ask participants to identify Sherry's preferences. Ask if other items should be added to the list. (If using projection equipment, record the responses on the projected grid.)

► **Teaching Tips**

If you are short of time, have one group work on the "Personal Assistance Planning List" while a second works on "Personal Preferences Assessment." Once each group is done, they can present their results to the other.

Don't get caught up in differences of opinion concerning Sherry's preferences. Take the first response, and have participants build on each other's suggestions. Make this a fun activity. Participants are essentially making up their own story about who Sherry is.

**11.** After participants have completed Sherry's "Personal Preferences Assessment," explain that they'll use the second copy of Handout 11 to fill in their own preferences as part of their homework assignment(see Activity 2.6). Encourage them to add items to the list that reflect their personal situation.

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## Module 2: Getting Started: Exploring Needs and Preferences

Activity 2.4, continued

### ► Teaching Options

If the participants in your class appear ready to proceed immediately into completing their own planning lists, you may skip the exercise of filling out lists for Sherry. However, the exercise lays a stronger foundation so that participants are more able to think through their own lists.

#### 12. Ask participants:

*What have you learned from this activity?*

*How does this process of identifying needs and preferences compare to what you have done in the past?*

*Which model of service delivery will allow you to get closest to identifying your ideal PA and making your ideal day a reality?*

*—Teaching Notes—*

## Activity 2.5 Opinion Poll 3

20 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Express their feelings and/or reactions regarding taking time to identify their needs and preferences before searching for PAs; and*

*Describe how past negative experiences in trying to hire a PA may interfere with their ability to find someone who is a good match for them.*

### Key Content

- This opinion poll asks participants to reflect on their feelings and/or reactions about using a formal process to identify their needs prior to beginning the search for personal assistants. Having strong unacknowledged beliefs about the activities and checklists can derail the hiring process because participants may not believe these investigations can make a difference. One purpose of this activity is to help participants become aware of their feelings so they can see how those feelings might interfere with this process and shortcut its potential to have a positive impact on their ability to find PAs who are good matches for them.
- Many disempowered people, including many people with disabilities, are not assertive in stating their beliefs and desires because their life experiences have shown that they don't always get what they ask for. A second goal of this activity is to encourage and support participants in asking for what they need and want.

### Activity Steps

#### Large-group exercise

1. Designate three different places in the room for participants to move to, based on their opinion: “Strongly Agree,” “Strongly Disagree,” “Of Mixed Opinion,” Give instructions:

*This third opinion poll is intended to help you acknowledge what you think about using the forms and process we just completed to work toward hiring a PA who is a good match for you.*

*I will read a statement. Please think about whether you strongly agree with that statement, strongly disagree, or are of mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.*

*After you hear the statement, please go to the part of the room that matches your opinion, and then we'll hear from people in each group about why they feel that way.*

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## Module 2: Getting Started: Exploring Needs and Preferences

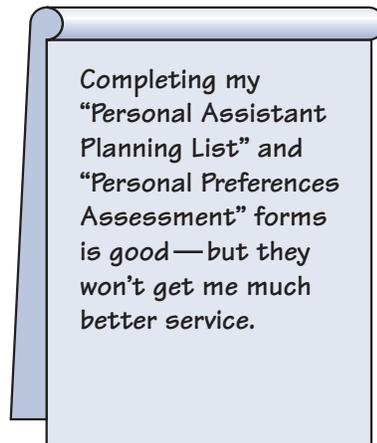
Activity 2.5, continued

### ► Teaching Tip

If space does not allow participants to move like this, or if participants have mobility challenges, give each participant three differently colored placards—one says “strongly agree,” the second says “strongly disagree,” and the third says, “of mixed opinion.” Then give instructions:

*After you hear the statement, please raise the placard that matches your opinion, and then we'll hear from people about why they feel the way they do.*

2. Display the prepared flip chart with the third opinion poll and read it aloud:



3. Remind participants about the location/correct placard for each group—strongly agree, strongly disagree, of mixed opinion. Ask participants to go the location that best represents how they feel about the statement or to raise the placard that best describes their opinion.

4. Facilitate dialogue by encouraging everyone in each group to explain his or her opinion. Lead a discussion by asking:

*What are your reactions to using these tools to identify your needs and preferences?*

*Did you find it easy or difficult to sort out your needs and preferences in this way? Why?*

*How can being conscious of your preferences help you find a PA that better meets your needs?*

*If you cannot find a PA who meets your ideal, how would knowing your preferences help you to make trade-offs and choose the best person to meet your needs?*

### ► Teaching Tips

If participants express discomfort with the planning tools, suggest other options for identifying needs and preferences. For example, writing or taping a narrative about oneself; explaining your preferences to a friend; using an old care plan from agency-directed services; talking to a case manager or counselor at a support agency.

To help participants think about how to prioritize and make trade-offs, refer back to Sherry's personal planning list and preferences. Ask:

*What trade-offs might Sherry make, if she couldn't find her ideal PA?*

## Activity 2.6 Closing

10 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Identify their level of comfort in directing their own PA services; and*

*State the next steps for additional training or follow up.*

### Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group. In addition, the end of day wrap-up allows participants to share what they learned, providing an informal evaluation for the instructor to determine what parts of the workshop were most useful.

### Activity Steps

#### Discussion

1. Explain that this is the end of today's session (and Workshop 1, "Introduction to the Consumer Directed Model," if appropriate), which is a time to reflect on what participants learned and how that learning can be applied to their personal situations. Ask participants:

*What is the most important thing you learned in this workshop?*

*How do you think you can apply what you learned to your own situation?*

*How do you feel about the consumer-directed option at this time? Do you feel prepared to make this choice and take on the responsibilities of being an employer?*

2. Remind participants about the homework assignment (see below). Let them know that if they are enrolled in the next workshop, "Finding and Hiring Personal Assistants," the homework will be reviewed during the first session. If they don't plan to continue with the workshop series, they should still complete the assignment if they plan to enroll in the consumer-directed program. Completing the forms will help each of them to find the right personal assistant for them.

#### Homework

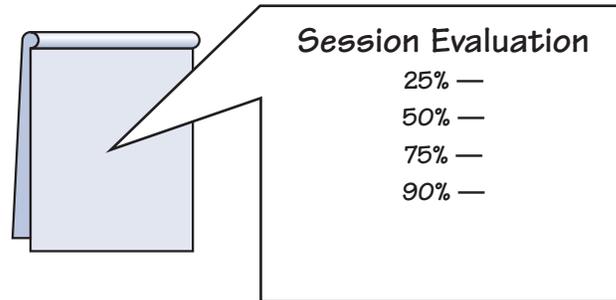
Referring to the blank copies of Handouts 10 and 11—"Personal Assistance Planning List" and "Personal Preferences Assessment: Mapping Out My Comfort Zone"—that have been distributed, instruct participants to think about their own needs and preferences. Ask them to fill out the handouts at home. Encourage them to add items to the lists that reflect their personal situations and their visions for an ideal day.

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## Module 2: Getting Started: Exploring Needs and Preferences

Activity 2.6, continued

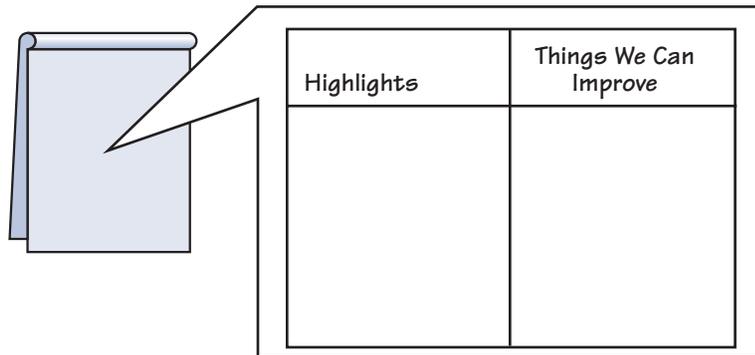
3. Conduct a quick evaluation by asking participants, “How much of today was a good use of your time?” Invite them to vote for the percentages you have listed on a prepared flip chart.



**Session Evaluation**

- 25% —
- 50% —
- 75% —
- 90% —

4. After they’ve voted and you’ve recorded the responses (praising those who give lower ranking for their honesty), ask them to tell you what worked really well for them—the highlights, and what they think could be better—the ‘low-lights.’ Record ALL answers on the flip chart.



Highlights	Things We Can Improve

Thank participants who give you critical feedback and emphasize that it will help you make future sessions better for participants.

5. Thank everyone for his or her feedback and participation. Explain your future plans. If you are offering the whole series, explain that the next workshop in the series will focus on recruiting and hiring PAs. Remind those who plan to take the next workshop to bring their homework assignments to the first session. If participants have not signed up for the entire series, explain that everyone is invited to participate. (Give dates if workshop is on the calendar and explain the enrollment procedure, if necessary.)

6. A fun way to draw the session to a close is to call for a motion to adjourn, and invite all who agree that it’s time to adjourn to say, “Aye!!”

7. Celebrate, as appropriate.

**Note:** For participants who don’t continue in the workshop series, you may want to set up a different mechanism to review the homework assignment. This could be done during a meeting with a case manager, or in a support group set up for clients considering the consumer-directed option.

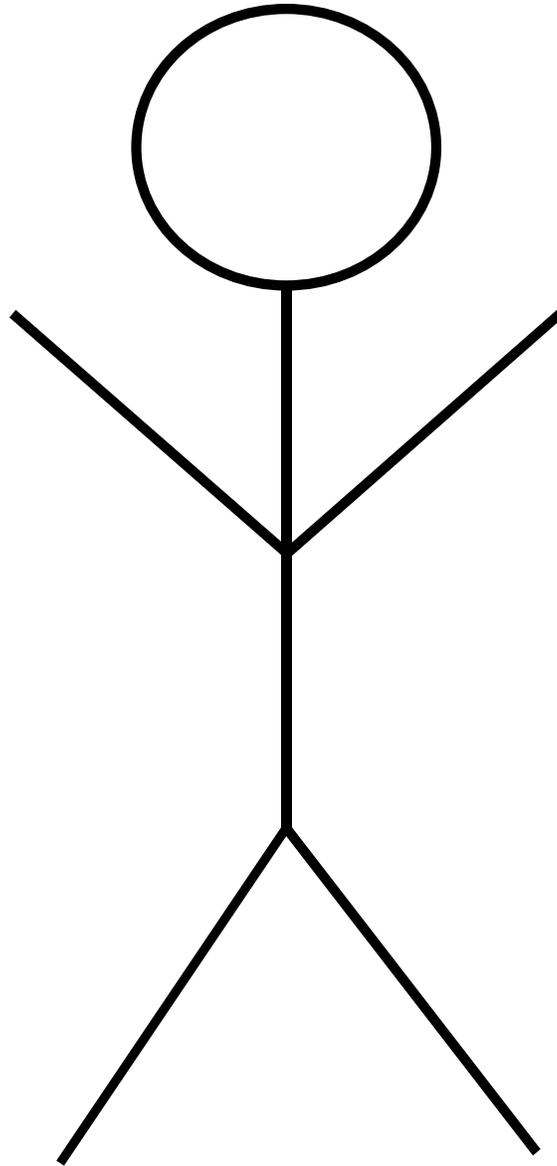
# **EMPLOYING, SUPPORTING, AND RETAINING YOUR PERSONAL ASSISTANTS**

## **A Workshop Series for People with Disabilities**

### **Handouts**

**Workshop I: Module 2  
Getting Started: Exploring Needs and Preferences**

# My Ideal Personal Assistant



## PERSONAL ASSISTANCE PLANNING LIST

	<b>Needs:</b>	How Often (days a week/ times a day)?	How long does it take (minutes)?	Preference of time of day (am/pm):	Notes (include preferences and other things):
ADL'S	Bathing/Showering				
	Dressing				
	Grooming (shaving, hair care, make-up, oral care)				
	Meal Preparation				
	Eating				
	Bowel Care				
	Bladder Care				
	Turning in Bed				
	Transferring				
	Exercising				
	<b>Other:</b>				
	<b>TOTAL:</b>				

## Personal Assistance Planning List, *cont...*

	<b>Needs:</b>	How Often (days a week/ times a day)?	How long does it take (minutes)?	Preference of time of day (am/pm):	Notes (include preferences and other things):
<b>Others</b>	Writing Letters/Mail				
	Grocery Shopping				
	Computer Assistance				
	Making Bed				
	Driving (Van?)				
	Errands				
	Laundry/ Ironing				
	Housekeeping				
	Answer Phone				
	Child Care				
	Pet Care				
	Reading				
	Others:				

## Personal Assistance Planning List, *cont...*

Medical	Needs:	How Often (Days a week/ Times a day)?	How long does it take?	Time of day preference (am/pm):	Notes (Include preferences and other things):
	Pressure Relief/ Positioning				
	Medications				
	Range of Motion				
	Skin Care/ Inspection				
	Suctioning/ Resp. Care				
	Wound Care				
	Diabetes Care				
	Other:				
	Other:				
Other:					

## Personal Preferences Assessment

### *Mapping Out My Comfort Zone*

	Quality	Very Important to Me	Somewhat Important to Me	I'm Flexible/ It Doesn't Matter
<b>ABOUT MY IDEAL PERSONAL ASSISTANT:</b>	Male			
	Female			
	Younger			
	Older			
	Non-smoker			
	Non-drinker			
	Night Person			
	Morning Person			
	Physically Strong			
	Religious/ Spiritual			
	Social			
	Talkative			
	Quiet			
	Sense of Humor			
	Driver			
	Others:			

## Personal Preferences Assessment, *cont...*

<b>TALENTS AND SKILLS OF MY IDEAL PERSONAL ASSISTANT</b>	Skill	Very Important to Me	Somewhat Important to Me	I'm Flexible/ It Doesn't Matter
	Read			
	Write/Type			
	Good Cook (my style of food)			
	Computer Literate			
	Good with Money Mgt.			
	Signs (ASL)			
	W/C Cleaning			
	Plant Care			
	Sewing			
	Others:			

## Personal Preferences Assessment, *cont...*

	<b>Preference Now or In the Future:</b>	All the time	Some-times	Never
<b>OTHER PERSONAL AREAS TO CONSIDER</b>	I like to go out and socialize			
	I drink alcohol and I may ask my PA to purchase it for me			
	I do illegal drugs			
	I smoke			
	I have a job			
	I volunteer			
	I participate in activities outside			
	I love to party and entertain			
	I go to school			
	I want my PA to eat meals with me			

# **Workshop II: Finding & Hiring Personal Assistants**

**Module 3: Finding Personal Assistant Candidates**

**Module 4: Preparing to Staff**

**Module 5: Hiring Personal Assistants**



Funding for the development of this curriculum was provided  
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Distributed by Direct Service Workers—AR Hands That Care

# 3

## Module 3

# Finding Personal Assistant Candidates

### Goal

- To increase participants' knowledge and skill in recruiting and pre-screening personal assistance staff, prior to beginning the interview process.

### Time

4 hours, plus breaks

Activities	Teaching Methods	Time
3.1 Welcome	Large-group exercise	15 minutes
3.2 Opinion Poll 4	Large-group exercise	20 minutes
3.3 Overview of the Hiring Process	Interactive presentation	20 minutes
3.4 Snapshot of Me: Reviewing Needs & Preferences	Pairs work, discussion	60 minutes
3.5 Finding Personal Assistant Candidates	Discussion	20 minutes
3.6 Creating an Advertisement	Discussion, pairs work	45 minutes
3.7 Telephone Pre-screening	Large-group exercise, discussion	45 minutes
3.8 Closing	Discussion	15 minutes

**Note:** If participants in this workshop did not complete Modules 1 and 2, the instructor will need to integrate Activity 2.4 from the previous module as the first part of Activity 3.4. This will extend this module to at least 4.5 hours, at which point it is recommended that the day be split into two shorter sessions. Even without this additional material, some participants may have difficulty staying focused for the full 4 hours. Consider either splitting the material into two days or meeting from 10 AM to 3 PM and taking an hour lunch break.

### Supplies

- If participants did not complete the first workshop in the series, provide three-ring binders to build a resource guide. If participants did complete the first workshop, they should bring their resource guides with their completed homework to the workshop.
- Flip chart, easel, markers, tape
- Paper and pens or pencils

**Note:** An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use overheads, make sure you have the necessary equipment and screen. (Some PowerPoint slides are provided on your CD. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.)

### Handouts

- Handout 12: “Workshop II: Goal and Objectives”
- Handout 13: “Today’s Learning—We Will...”
- Handout 14: “Steps to Follow in Hiring Your Personal Assistant”
- Handout 15: “Sherry’s Snapshot of Me”
- Handout 16: “Snapshot of Me”
- Handout 17: “Where to Find Personal Assistants”
- Handout 18: “Creating an Advertisement”
- Handout 19: “Sample Ads”
- Handout 20: “Phone Pre-Screening Exercise”

### Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants’ physical needs.

Review the teaching materials for each activity.

Set up projector and other equipment, as necessary, for optimum viewing by all participants.

Remind participants that if they completed Workshop I, they need to bring their resource guides with their completed Handouts 10 and 11: “Personal Assistance Planning List” and “Mapping Out My Comfort Zone.”

### Activity 3.1 Welcome

Make copies of Handout 12, “Workshop II: Goal and Objectives,” for all participants and prepare a flip chart with the same information for step 2.

If you plan to use Handout 13: “Today’s Learning—We Will...” make copies for all participants.

Prepare a flip chart with the day’s activities and times, including breaks, for step 5

### **Activity 3.2 Opinion Poll 4**

Prepare a flip chart with the fourth opinion poll shown in step 3.

If you choose to use placards for this exercise, prepare them in advance (see step 2, Teaching Tip).

### **Activity 3.3 Overview of the Hiring Process**

Make copies of Handout 14: “Steps to Follow in Hiring Your Personal Assistant.”

Prepare a flip chart with the “Essential Elements of a Complete Hiring Process,” as shown in step 5.

### **Activity 3.4 Snapshot of Me: Reviewing Needs & Preferences**

Copy of Handout 15, “Sherry’s Snapshot of Me” for all participants.

Copy Handout 16, “Snapshot of Me” for all participants.

Be prepared to remind participants about Sherry’s profile and needs and preferences from Module 2. If using an overhead or LCD projector, you may want to have ready “Sherry’s Personal Planning List” and “Sherry’s Mapping Out My Comfort Zone” from Module 2, Activity 2.4. (Samples of these slides from previous workshops are in the PowerPoint folder on your CD.)

### **Activity 3.5 Finding Personal Assistant Candidates**

Copy Handout 17, “Where to Find Personal Assistants,” for all participants.

### **Activity 3.6 Creating an Advertisement**

Prior to this activity, be sure that you are familiar with the basic legal and personal safety issues regarding advertising for a personal assistant position, as well as the legal and personal safety issues involved in interviewing candidates. If you, as a trainer, are not familiar with these areas, it might be a good idea to consult with someone from a consumer organization or home care agency who has this expertise.

Copy Handout 18, “Creating an Advertisement,” for all participants, and prepare a flip chart page with the same content as shown in step 1.

Copy Handout 19, “Sample Ads,” for all participants.

### **Activity 3.7 Telephone Pre-Screening**

Copy Handout 20, “Phone Pre-Screening Exercise,” for all participants.

### **Activity 3.8 Closing**

Prepare a flip chart page to record evaluation scores as shown in step 3.

*–Teaching Notes–*

## Activity 3.1 Welcome

15 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

- Describe the goals and objectives of the workshop; and*
- Identify each other by name.*

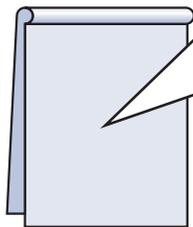
### Key Content

- This activity introduces the overall goal and objectives for the workshop.
- **Workshop Goal:** After completing this workshop, participants will have the knowledge and skills they need to begin recruiting and hiring their personal assistance staff.
- **Objectives:** Participants who complete this workshop will be able to:
  - Advertise, screen, interview, and hire personal assistants (PAs) who best match and support their needs and preferences; and
  - Communicate effectively with potential PAs, using active listening skills, including asking open-ended questions and paraphrasing.

### Activity Steps

#### Large-group exercise

1. Welcome participants. Introduce the instructors. Ensure that everyone is comfortable with the layout and temperature of the room.
2. Distribute Handout 12, “Workshop Goal and Objectives” for participants’ binders. (If participants have not attended a previous workshop, distribute the handout with a binder that will hold all of the handouts from the workshop.)
3. Post the flip chart page, “Workshop Goal and Objectives.”



**Workshop Goal:** After completing this workshop, participants will have the knowledge and skills they need to begin recruiting and hiring their personal assistance staff.

**Objectives:** Participants who complete this workshop will be able to:

- Advertise, pre-screen, interview, and hire personal assistants (PAs) who best match and support their needs and preferences.
- Communicate effectively with potential PAs, using active listening skills, including asking open-ended questions and paraphrasing.

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## Module 3: Finding Personal Assistant Candidates

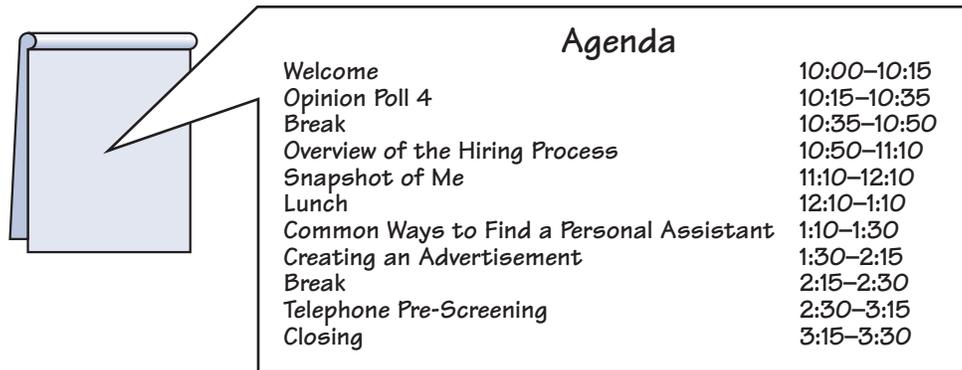
Activity 3.1, continued

4. Review the bullet points on the flip chart, and encourage questions.

► **Teaching Tip**

Use Handout 13, "Today's Learning—We will..." as an alternative or additional handout.

5. Post the flip chart: Agenda for the day's activities.



Agenda	
Welcome	10:00–10:15
Opinion Poll 4	10:15–10:35
Break	10:35–10:50
Overview of the Hiring Process	10:50–11:10
Snapshot of Me	11:10–12:10
Lunch	12:10–1:10
Common Ways to Find a Personal Assistant	1:10–1:30
Creating an Advertisement	1:30–2:15
Break	2:15–2:30
Telephone Pre-Screening	2:30–3:15
Closing	3:15–3:30

► **Teaching Tip**

The agenda for the day is flexible. The number of breaks you need will depend on your participants. If this is too long a day, consider breaking the workshop into two parts.

6. Review the day's agenda, and agree on the timing of breaks. Address any concerns about overall logistics or space.

7. Ask participants to introduce themselves. If people do not already know one another, ask them to share how long they have been interested in, or actually directing, their own services and to say something about themselves that they'd like the group to know. Note that the style of this workshop is very participatory and interactive. Everyone will have opportunities to share their thoughts, feelings, and experiences, but emphasize that participants will never be forced to speak.

► **Teaching Tip**

If participants have completed Modules 1 and 2 together, and already know each other, consider reviewing the workshop goal and objectives and the day's agenda only. Then, use this time as a check-in.

Ask participants about how they feel after Workshop I, and where they are—emotionally and practically—in considering the consumer-directed option to meet their needs. Ask participants if they are ready to begin the recruitment process.

—Teaching Notes—

## Activity 3.2 Opinion Poll 4

20 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Recognize that people have different experiences with finding personal assistants (PAs) and that it is important to investigate various options in order to have a large and appropriate pool of candidates.*

### Key Content

- This opinion poll is intended to stimulate debate about the pros and cons of hiring friends and family members as personal assistants or using them to get referrals of possible candidates.

### Activity Steps

#### Large-group exercise

1. Give instructions:

*This exercise is an opinion poll intended to get you started thinking about how to find a PA.*

*I will read a statement. Please think about whether you agree with this statement, disagree, or you are of mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.*

*After you hear the statement, please go to the part of the room that matches your opinion, and then we'll hear from people in each group about why they feel that way.*

2. Designate three different places in the room for participants to move to, based on their opinion: "Agree," "Disagree," and "Of Mixed Opinion."

#### ► Teaching Tip

If participants have mobility challenges (or the room itself poses a challenge to people moving around), give each participant three differently colored posters: "Agree," "Disagree," and "Of Mixed Opinion." Then give instructions:

*After you hear the statement, please raise the poster that matches your opinion, and then we'll hear from people about why they feel the way they do.*

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## Module 3: Finding Personal Assistant Candidates

Activity 3.2, continued

3. Display the opinion poll on a flip chart, and read it aloud:



4. Remind participants about the location/correct placard for each opinion: “Agree,” “Disagree,” and “Of Mixed Opinion.” Ask participants to go the location/raise the placard that best represents how they feel about the statement.

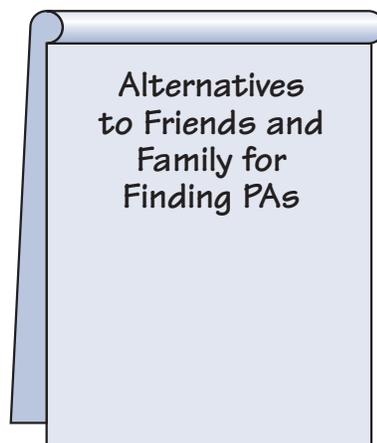
5. Facilitate a dialogue. Encourage everyone in each group to explain his or her opinion. Ask the following questions to get the discussion started:

*What are your reactions to this statement?*

*Why do you think you reacted the way you did to this statement?*

*How might your reactions influence your search to find a PA?*

6. As participants voice alternatives to friends and family for finding PAs, record responses on a flip chart. Save this flip chart for use in Activity 3.5.



### ► Teaching Tip

Consider using a different flip chart to record the advantages and disadvantages of looking to “families and friends” as the way to find PAs. Emphasize that both points of view can be true.

7. Thank everyone for being candid in sharing opinions and for being respectful toward others.

## Activity 3.3 Overview of the Hiring Process

20 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Recognize that in addition to regularly scheduled PAs, it is important to have back-up and emergency coverage; and*

*Describe a process for identifying, assessing, and hiring PAs.*

### Key Content

- Building on Activity 2.4, the ultimate objective in the hiring process is finding a PA who is a good match for the consumer. The initial and most important step in recruiting a PA is that a consumer identify his or her own needs and preferences and be able to clearly explain them.

- The basic categories for staffing are:

- **Regularly scheduled PAs:** workers who are scheduled for regular shifts each week, including weekends. They may work full-time or part-time.
- **Back-up PAs:** people who are prepared to come in whenever the regular PA needs time off (e.g., for medical appointments or vacation).
- **Emergency PAs:** people to call on when both the regularly scheduled PAs and the back-ups are not available.

Many consumers have a single plan, whether for emergencies or scheduled absences.

During the hiring process, consumers will probably encounter PA candidates who fit well in some categories and not in others.

- Having a multi-step process before making a final offer of hire provides various opportunities to screen candidates. Spending extra time at the beginning to carefully select the best candidates pays off in not having to spend time later dealing with a poor fit. The essential elements of a complete hiring process include:

- Advertising
- Pre-screening
- Interviewing
- Assessing
- Checking references
- Making the offer
- Contacting candidates not offered the position

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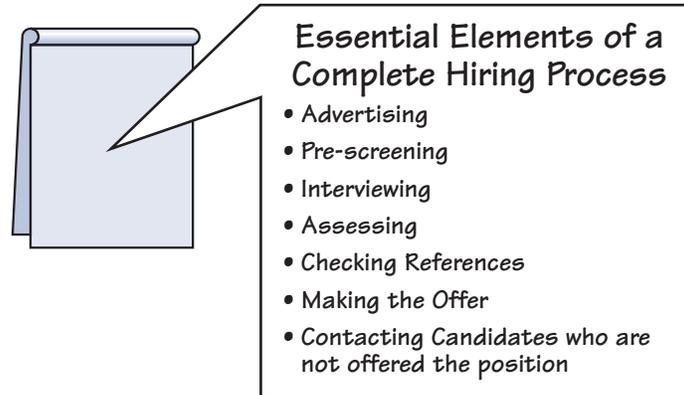
## Module 3: Finding Personal Assistant Candidates

Activity 3.3, continued

### Activity Steps

#### Interactive Presentation

1. Introduce the basic categories of staffing. Ask participants what the difference would be between regular, back-up, and emergency coverage?
2. Using a flip chart, display “Essential Elements of a Complete Hiring Process” Review each step of the hiring process. Ask participants if they have questions about this process.



3. Wrap up the discussion by distributing Handout 14, “Steps to Follow in Hiring Your Personal Assistant.”
4. Note that today’s session will focus on recruiting and pre-screening candidates prior to arranging for interviews. The next two modules will include developing a staffing plan and a PA schedule; interviewing candidates; and hiring staff.

—Teaching Notes—

## Activity 3.4 Snapshot of Me: Reviewing Needs & Preferences

60 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Clearly state their personal assistance and support needs and preferences;*

*Identify daily, weekly, and occasional needs in a “Snapshot of Me;”*

*Create a rough daily schedule of PA support needs; and*

*Assess the optimum number of personal assistance hours they need to successfully manage their daily activities.*

### Key Content

- Consumers must know their needs and preferences and approved service hours in order to develop an appropriate staffing plan and to hire one or more PAs who are good matches.
- After thoroughly considering needs and preferences, it is helpful to create a single “snapshot” that provides an overview of the kinds of assistance the consumer needs, how often, and for how long. This will become the basis of the consumer’s staffing plan and assistance schedule.
- The consumer’s “Snapshot of Me” can be shared as an easy reference guide with candidates interviewing for PA positions.

### Activity Steps

**Note:** If participants in this workshop did not complete Modules 1 and 2, the instructor needs to integrate Activity 2.4 from the previous module as the first part of this Activity, and have participants complete their “Personal Assistance Planning List” and “Mapping Out My Comfort Zone” at the session.

#### Pairs work (10 minutes)

1. Have participants form pairs. They should choose partners with whom they are comfortable sharing.
2. Instruct the pairs to take out their homework—their completed “Personal Assistance Planning List” and “Mapping Out My Comfort Zone.” Ask them to share the assistance and support needs they identified and any personal preferences that were important to them. Ask:

*How often did these tasks need to be done and how many hours would they need assistance to complete them?*

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## Module 3: Finding Personal Assistant Candidates

Activity 3.4, continued

### Discussion (10 minutes)

3. Bring the group back together, and ask:

*What did they discover about their needs and preferences by filling out these assessments?*

*Did their analysis suggest that they should look for a particular type of person for their PA positions?*

4. Distribute Handout 15, “Sherry’s Snapshot of Me.” Remind the group that they discussed Sherry’s needs and preferences during the previous workshop. Discuss how that information has become “Sherry’s Snapshot of Me.”

#### ► Teaching Tip

If participants need help being reminded of Sherry’s needs and preferences, you can re-read Sherry’s profile (see Activity 2.4). If you are using a projector, you may want to display the transparencies or computer files created during Activity 2.4 for “Sherry’s Planning List” and “Sherry’s Mapping Out My Comfort Zone.” (The Module 3 folder on your CD includes samples of these files from previous workshops.)

Handout 15, “Sherry’s Snapshot of Me,” may not correspond exactly with the profile of Sherry that participants developed as they created “Sherry’s Planning List” and “Sherry’s Mapping Out My Comfort Zone” in Module 2. If this is a potential source of confusion, you may wish to revise “Sherry’s Snapshot of Me,” to more accurately reflect the fictional profile your group created. If you change “Sherry’s Snapshot of Me,” however, you will also need to adjust Handout 22, “Sherry’s Staffing Plan and PA Schedule,” used in Module 4.

### Pairs Work (35 minutes)

5. Distribute Handout 16, “Snapshot of Me.” Ask participants to get into pairs, and make sure that each pair includes at least one participant who can write.

6. Instruct the pairs that they will have 30 minutes to complete their personal “snapshots.” They should spend 15 minutes on each person’s snapshot, helping each other to identify their most important daily, weekly, and occasional needs, and estimating how they would break up the hours in a day (page 2 of Handout 16). In completing page 2 of Handout 16, ask participants to put their total approved hours in the top right hand corner and to figure out their needs based on these hours.

#### ► Teaching Tip

Let pairs know that if one person has difficulty with writing skills, the other can act as the scribe, but even when writing for their partner, the focus should be on helping the partner think through his or her own needs.

Monitor the room and make sure partners are helping each other move through the task. If you are aware of specific pairs that may need assistance, due to cognitive or physical disabilities, spend time with those pairs to assist them more directly.

If participants do not know their total “approved hours” they can make an estimate by adding up the total number hours a week they receive services now.

### Discussion (5 minutes)

7. Bring the group back together for a final wrap up. Invite questions or concerns, and discuss them. Explain that their “Snapshot of Me” will help them develop their staffing plan and assistance schedule so that they can recruit, screen, and hire personal assistants who can meet their needs.

*–Teaching Notes–*

*–Teaching Notes–*

# Activity 3.5 Finding Personal Assistant Candidates

20 minutes

## Learning Outcome

By the end of this activity, participants will be able to:

*Identify an array of recruitment options and describe the advantages and disadvantages of the different strategies.*

## Key Content

- Using an array of options to find a PA strengthens the likelihood that a consumer will have a large pool of applicants to select from. In addition to finding one or more regular PAs, a large pool will enable the consumer to identify possible staff for back-up and emergency coverage.
- Common areas to look for or advertise for a PA include:
  - Community and social networks
  - Newsletters and leaders of groups to which the consumer belongs
  - Newspapers
  - Independent living centers and area agencies on aging
  - Community or local college or universities
  - Hospitals, medical centers, and nursing homes
  - Registries and hotlines

## Activity Steps

### Discussion

**Note:** Have available the flip chart with the list of recruiting options created in Activity 3.2.

1. Introduce this activity by telling participants that there is no one best way to find a PA—there is no magic formula. However, some methods increase the likelihood of finding a PA who is a good match.

2. Ask participants:

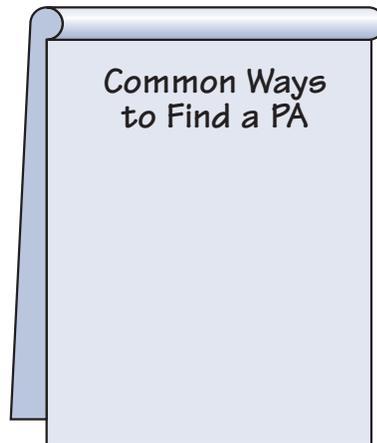
*What are some common ways you've tried to find a PA?*

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## Module 3: Finding Personal Assistant Candidates

Activity 3.5, continued

Write their responses on a flip chart. Refer back to the answers generated in Activity 3.2, and brainstorm other possibilities.



3. After listing their ideas, discuss the pros and cons of each strategy, seeking input from participants based on their experiences.

### ► Teaching Tips

When participants list newspapers as one way to find PAs, they often name only the larger newspapers, whose ads are costly. Prior to this activity, it is helpful for the instructor to find out the names of local "penny saver" newspapers, where advertising is inexpensive.

Regarding friends and families, it is important to point out that hiring them (or hiring *their* friends and family) is not the only way to ask people to help in the search for PAs. Ask participants to find out from friends and family if they know people in their jobs, churches, social networks, clubs, etc., who can post a job ad for a PA.

4. Distribute Handout 17, "Where to Find Personal Assistants," and compare this list to the one they just generated. Invite questions and concerns and discuss them.

5. Ask that participants, between now and the next session, to identify two sources from which to recruit PAs that they are not familiar with and to research how to recruit through that source (i.e., put an ad in a newsletter, post an ad on a bulletin board, send an e-mail). They should bring this information with them next time.

### —Teaching Notes—

## Activity 3.6 Creating an Advertisement 45 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe what to include and what not to include in an advertisement for a personal assistant (PA); and*

*Understand the importance of creativity in wording ads to find a PA who is close to their ideal.*

### Key Content

- Ads with appealing details and complete information generate the best responses. Details that make the job appealing include:
  - Attractive or flexible hours
  - Interesting person to work with
  - Easy location to get to
  - Rewarding work
  - Benefits
- Important information to put in an advertisement includes:
  - Hours of work
  - Pay
  - General location (never give out home address)
  - Phone number to call for information about the job
  - General description of job responsibilities

### Additional Advance Preparation

Questions may arise—for example, “Can I say I want to hire a female?” or “Can I say I want someone who is young or black?”—regarding legal issues in advertising and hiring. We suggest that instructors be familiar with basic legal issues related to advertising for and interviewing potential employees, but do not attempt to give legal advice.

### Activity Steps

**Note:** For this activity, participants will need their completed “Snapshot of Me” (Handout 16).

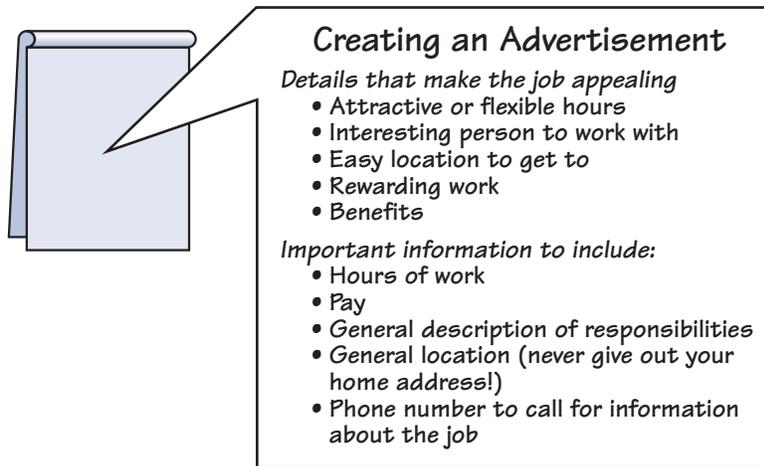
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## Module 3: Finding Personal Assistant Candidates

Activity 3.6, continued

### Discussion (15 minutes)

1. Distribute Handout 18, “Creating an Advertisement,” and display the prepared flip chart.



**Creating an Advertisement**

*Details that make the job appealing*

- Attractive or flexible hours
- Interesting person to work with
- Easy location to get to
- Rewarding work
- Benefits

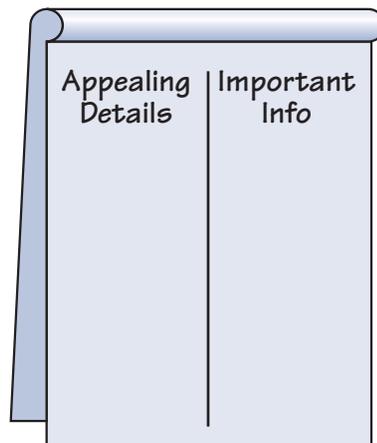
*Important information to include:*

- Hours of work
- Pay
- General description of responsibilities
- General location (never give out your home address!)
- Phone number to call for information about the job

2. Discuss the “details that make the job appealing,” and “important information to include.” Ask participants to brainstorm ideas for language that will convey the following:

- *Characteristics that make the job appealing (e.g., flexible schedule)*
- *Important information (e.g., number of hours, pay, general location of the consumer, job responsibilities, and how to contact the consumer or person assisting with hiring)*

Write responses on a flip chart.

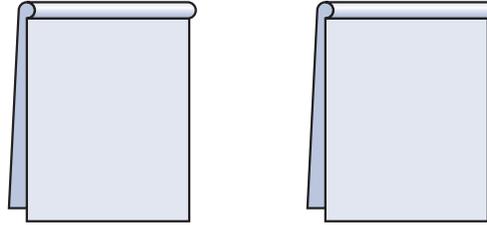


Appealing Details	Important Info

#### ► Teaching Tip

Ask participants to be specific in their descriptions; for example, rather than saying “flexible hours,” they might say, “work around your school schedule” or “weekend and evening hours available.” The location might be described as “close to public transportation,” “center of town,” “close to campus,” (if appealing to students). If participants are struggling with the concept, use Sherry’s profile and “Snapshot of Me” (Handout 15) as the basis for developing some good advertising copy.

3. Using the group's responses compose an ad that brings the consumer to life and invites responses. Record the ad on the current flip chart page, or start a new page, but post the two pages side by side so participants can see their previous suggestions.



4. Discuss what should NOT be in the ad, in order to maintain safety (e.g., never give out home address).

5. Distribute Handout 19, "Sample Ads," and review the content of each ad. Ask participants to imagine themselves looking for jobs as PAs, and to think about whether they would respond to each ad and why. (If you are using overhead or LCD projection, you may want to project the sample ads).

### **Pairs work (20 minutes)**

6. Put participants into pairs, ensuring that one person in each group is able to write with some ease.

7. Tell the pairs they will have 20 minutes, and should spend 10 minutes working on each person's ad. Encourage each person to review their "Snapshot of Me" and brainstorm ideas.

Tell partners to coach each other by asking helpful questions and making suggestions. Each participant should take the best ideas from the discussion of their ads and create the first draft of an advertisement at the bottom of Handout 18, "Creating an Advertisement." If only one of the pair writes easily, he or she can act as scribe for both.

### **Discussion (10 minutes)**

8. Bring the group back together. Ask volunteers to share their ads with the group. Praise what works well and suggest possibilities for improvement. Thank volunteers. Note that the ads created today need not be participants' final efforts; they should refine their ads before actually using them.

#### **▶ Teaching Tip**

Encourage participants to be creative in describing their important details, as they would in writing an ad in the personals.

*–Teaching Notes–*

## Activity 3.7 Telephone Pre-Screening

45 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Explain the importance of pre-screening candidates;*

*Ask appropriate questions to determine if they would like to interview candidates who respond to ads; and*

*Identify their own biases and reactions to various types of responses from candidates.*

### Key Content

- Using the telephone (including answering machines or voice mail) as an initial screening tool has advantages and disadvantages.

#### Advantages:

- Ability to screen out potentially dangerous candidates.
- Ability to ask questions about the most important areas identified in your needs and preferences list.

#### Disadvantages:

- Differences in detecting personality over the phone vs. in person.
- Possibility of screening out someone based on his or her answers to one or two questions or a first impression on the phone.
- Potential for screening out someone who may not be able to fill the necessary hours right now but who may be able to in the future or who could serve as a back-up or emergency PA.
- It is important to understand assumptions and biases that influence one's initial decision about a candidate.
- In a phone conversation, three to five questions about “non-negotiable” issues can help to determine if the candidate is compatible with the employer's needs and preferences.

### Activity Steps

#### Discussion (5 minutes)

1. Set the stage for the discussion by asking participants to imagine that they have placed their ads and candidates have left messages; now they have the opportunity to talk with respondents before meeting them one-on-one. Ask participants to state whether they agree or disagree with the following statement:

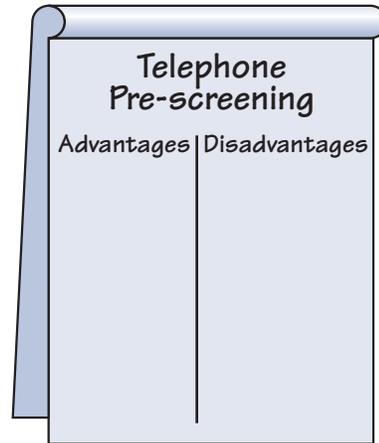
*Telephone pre-screening is a good idea.*

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## Module 3: Finding Personal Assistant Candidates

Activity 3.7, continued

Encourage participants to support their opinions, effectively eliciting the advantages and disadvantages outlined in Key Content. You may want to use a flip chart to record opinions as participants suggest them.



### ► Teaching Option

This discussion could be skipped to save time, but if it is, the instructor should briefly review some or all of the themes identified in Key Content.

You may also launch this discussion as an “Opinion Poll,” but this will take more time.

### Large-group exercise (30 minutes)

2. Distribute Handout 20: “Phone Pre-Screening Exercise.” Depending on how much time remains, select several messages for discussion. For each message, read it aloud or ask a participant to do so. Ask participants:

*Would you call back—yes/no/maybe? Why?*

3. Facilitate a discussion that raises questions about assumptions participants might bring to their decisions about who to call back. For example, are they apt to screen out people they consider too old or too young, not sufficiently articulate, the “wrong” gender, from the “wrong” neighborhood, etc.

### ► Teaching Tips

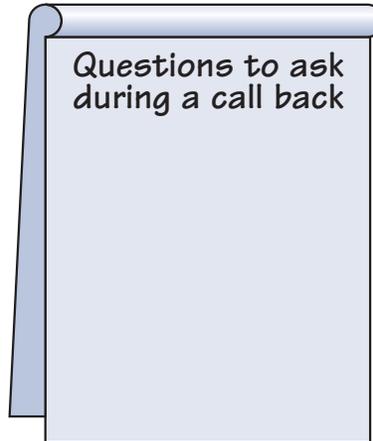
This handout works extremely well in eliciting how and when people make assumptions about others. It helps participants begin to build self-awareness about the fact that we all make assumptions.

Be prepared to play devil’s advocate to some assumptions that may arise around particular candidates in order to dramatize how an assumption may unintentionally lead to screening out a suitable candidate.

Emphasize that phone screening is a relatively safe way to gather information about candidates and to help decide whether to conduct an in-person interview, but they should be careful about being overly selective and limiting their pool of potential PAs.

**Discussion (10 minutes)**

4. Ask participants what questions they would ask during a call back to explore whether they would like to invite the candidate to an interview. Write their responses on a flip chart.



5. From the list generated, ask participants which questions are most important. Look for answers that focus on “non-negotiables” such as hours of availability, ability to drive, specialized experience, motivation to do this work, etc.

*–Teaching Notes–*

*–Teaching Notes–*

## Activity 3.8 Closing

15 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Identify at least one thing they learned today that they will use when they begin recruiting and pre-screening candidates; and*

*State what they will be working on at home before the next session and identify the next steps for additional training or follow up.*

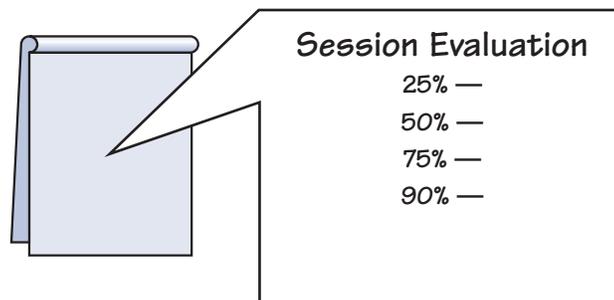
### Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group. In addition, the end of day wrap-up allows participants to share what they learned, providing an informal evaluation for the instructor to determine what parts of the workshop were most useful.

### Activity Steps

#### Discussion

1. Explain that the day's activities are coming to a close. Ask participants to go round and name one thing from today's workshop that they will keep in mind when they begin recruiting and pre-screening candidates.
2. Ask participants if they have any questions or concerns about recruiting and pre-screening.
3. Conduct a quick evaluation by asking participants, "How much of today was a good use of your time?" Invite them to vote for the percentages you have listed on a prepared flip chart.

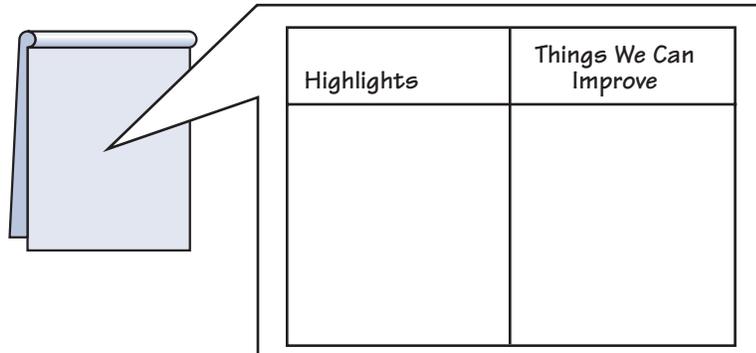


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## Module 3: Finding Personal Assistant Candidates

Activity 3.8, continued

4. After they've voted and you've recorded the responses (praising those who give lower ranking for their honesty), ask them to tell you what worked really well for them—the highlights, and what they think could be better—the 'low-lights.' Record ALL answers on the flip chart.



The image shows a flip chart with a table. To the left of the table is a drawing of a flip chart with a blue cover and a white page. A white arrow points from the flip chart to the table. The table has two columns and two rows. The top-left cell contains the word "Highlights", and the top-right cell contains the phrase "Things We Can Improve". The bottom two cells are empty.

Highlights	Things We Can Improve

Thank participants who give you critical feedback and emphasize that it will help you make future sessions better for participants.

A fun way to draw the session to a close is to call for a motion to adjourn, and invite all who agree that it's time to adjourn to say, "Aye!"

5. Congratulate everyone on the hard work they did in today's workshop. If participants will be continuing with additional modules for this workshop, remind them about the home work assignment and the time and place for the next session.

Explain that, now that they've considered how to find a personal assistant to suit their needs, the next session will focus on interviewing candidates so that they can determine who will truly be a great personal assistant for them.

### Homework

- Identify two sources for recruiting PAs that you hadn't considered before.
- Find out how you would go about recruiting PAs through that source (e.g., putting an advertisement in a newsletter, posting an ad on a bulletin board, contacting a committee, sending an e-mail).

# **EMPLOYING, SUPPORTING, AND RETAINING YOUR PERSONAL ASSISTANT**

## **A Workshop Series for People with Disabilities**

### **Handouts**

#### **Workshop II: Module 3 Finding Personal Assistant Candidates**

# Workshop II: Finding and Hiring Personal Assistants

## Goal & Objectives

- ◆ **Workshop Goal:** After completing this workshop, participants will have the knowledge and skills they need to begin recruiting and hiring their personal assistance staff.
  
- ◆ **Objectives:** After completing this workshop, participants will be able to:
  - ◆ Advertise, pre-screen, interview, and hire personal assistants (PAs) who best match and support their needs and preferences.
  
  - ◆ Communicate effectively with potential PAs, using active listening skills, including asking open-ended questions and paraphrasing.

# Getting Started – Looking for Personal Assistants

## TODAY'S LEARNING—WE WILL....

- ❖ LEARN and TALK about steps in a complete hiring process ('soups to nuts')
- ❖ LEARN MORE about how to use our Planning Tasks and Preference lists to help us make a plan for hiring Personal Assistants
- ❖ LEARN about using ADVERTISEMENTS to find Personal Assistants and PRACTICE making our own ads
- ❖ TALK about using TELEPHONES in the hiring process
- ❖ TALK about different ways to find people to interview

# Steps to Follow in Hiring Your Personal Assistant

**Advertise** .....

*This includes word-of-mouth outreach!*

Come work for me!!!



**1<sup>st</sup> Look** 👁️ 👁️ **(Pre-screening)**...

*What is your first impression? What do you think?*



**2<sup>nd</sup> Look** 👁️ 👁️ **(Interview)**.....

*Now what do you think?*



**3<sup>rd</sup> Look** 👁️ 👁️ **(Assessment)**.....

*How close to your Perfect PA is this person?*



**4<sup>th</sup> Look** 👁️ 👁️ **(Check References)**.....

*What do other people think about this person?*



**Make the job offer**

*Would you like to come work for me???*

I'd like to hire you...



**Contact Candidates who were not offered the position**.....

# A Snapshot of Me

*SAMPLE FOR SHERRY*

## Daily I would need:

## Notes:

**Shower:** For safety reasons I have a shower chair.

**Assisting with dressing/getting clothes ready:** I CAN do some things.

**Setting my hair:** I know daily seems like a lot, but I really like to have it done every day.

**Housekeeping:** Doing dishes, helping me make my bed/ change linens.

**Exercise:** I like to ride the stationary bike, and I'd like you to be around just in case I need assistance getting on/off.

## A couple times a week (or as specified)

## Notes:

**Vacuuming:** I have a cat and it gets a little hairy!

**Help me** change the cat's litter box.

**Assist in local errands:** groceries, laundry, mailbox, pharmacy, etc.

**Cooking:** I can make sandwiches and soups but I need some help with larger meals when I have guests or just want something homemade and hot.

## Weekly I need:

## Notes:

Full apartment **cleaning**, dusting, mopping, linens, etc.; I want to help where I can, but doing it on my own is tough.

**Errands** with me—outing around town with me so I can have an assistant help me carry, pick up things, etc.

## My Most Important Personal Preferences:

I prefer working with a woman, someone strong and healthy, a non-smoker and non-drinker. I go to church so I'd like a religious person. She HAS to have a sense of humor and it can't be someone who is shy and is afraid to speak up. I want someone who can express his/her own needs as well. I'd love to get someone who can cook some good Southern cuisine, but it's not vital. I definitely want someone who can braid hair. I drink every once in a while, so she may have to purchase it for me every once in a while. I'd like someone who is trained (maybe a CNA) but I'm not against showing her the ropes myself if she doesn't have this training.

**Rough Schedule Based on the Snapshot** **Total Hours a Week: 42**

Day of the Week:	Mon.	Tues.	Wed.	Thurs.	Friday	Sat.	Sun.
<b>ADL's/ Medical Morning</b>	2 Hours	2 Hours	2 Hours	2 Hours	2 Hours	2 Hours	2 Hours
<b>ADLS's/ Medical Evening</b>	2 Hours	2 Hours	2 Hours	2 Hours	2 Hours	2 Hours	2 Hours
<b>Other (errands, laundry, house- keeping)</b>	2 Hours for errands and groceries	1 Hour for house-keeping	3 Hours for errands and groceries	3 Hours for laundry	1 Hour for house-keeping	2 Hours for errands and groceries	2 Hours for house-keeping
<b>Totals Daily:</b>	6	5	7	7	5	6	6

# Snapshot of Me

**Daily (ADLs/ Medical/Other)      Total Hours Daily:**

**A few times EVERY week      Total Hours Weekly:**

**Once EVERY week      Total Hours Weekly:**

**Occasionally      When it can be fit in**

**My most important personal preferences**

**Rough Schedule based on the Snapshot** **Total Hours a week: 42**

<b>Day of the Week:</b>	<b>Monday</b>	<b>Tues.</b>	<b>Wed.</b>	<b>Thurs.</b>	<b>Friday</b>	<b>Sat.</b>	<b>Sunday</b>
<b>ADL's/ Medical Morning</b>							
<b>ADL's/ Medical Evening</b>							
<b>Other (errands, laundry, house- keeping)</b>							
<b>Totals Daily:</b>							

# Where to Find Personal Assistants

Your own community –

Friends, family, peers, current PAs

- Ask them to get the word out.
- Post Ads on Bulletin boards at Shopping Centers, Laundromats, Coffee Shops, Bookstores, ATMs

Newsletters and leaders of groups you belong to –

- Place job posting on churches, temples, and synagogues bulletin boards
- Ask leaders if they know people to refer to you or if they have other ideas that might help you find a PA

Newspaper advertisements

- **THINK LOCAL!**, e.g. college, town and community newspapers

Independent Living Centers/Area Agencies on Aging

- Check registries or lists of workers who may be able to work for you

Community and local college

- Target especially colleges with health related programs. They may have career centers to place ads for students and CNA or Home Health Training programs

Community Health Centers or Clinics, Day Care Sites, Nursing homes

- Post ads on bulletin boards to attract a staff looking for extra hours

Registries/Hotlines/Internet –

- (e.g. Craigslist.com; Online support communities for people with disabilities etc.)



## WHAT TO INCLUDE IN AN ADVERTISEMENT:

### Details that make the job appealing

- Attractive or flexible hours
- Interesting person to work with
- Easy location to get to
- Rewarding work
- Benefits

### Important information to include:

- Hours of work
- Pay
- General description of responsibilities
- General location (never give out your home address!)
- Phone number to call for information about the job

### An advertisement for me might look like:

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## Sample Ads

Help woman with disability \$9/hr on Upper East Side; assist woman in basic personal care and getting to school; no early morning hours! Start at 10 am; must be nonsmoker who likes cats; call Michelle, leave message xxx-xxx-xxxx.

**Need someone 40 hours/wk F/T** work with health insurance and other benefits. Personal assistant needed to help with dressing, bathing, laundry, house-keeping. Need to be willing to go to work with me--assist in typing, making phone calls--in a great work environment. Must love dogs! \$9/hour. Call Tracey if interested at xxx-xxx-xxxx.

### **Personal Assistant Needed**

No training needed; \$8.50/ hour, about 20 hours/week; Help young guy in w/c with personal care needs + running errands; computer skills and interest in rap music a must. Close to A train. Call Rob at xxx-xxxx.

### **Looking for College**

**students** to help disabled young mother get ready in the morning, assist with personal care, errands, housecleaning. Must like kids. \$10/hour, 20 hours a week (7 am-11 am). Morningside Heights area. Call Renee at xxx-xxx-xxxx.

### **Personal Assistant Needed**

for weekends. \$8 hour/8 hours. Assist older, lively woman with personal care, shopping, and other errands. I love to go downtown to hunt for bargains and need person to assist on weekends only! Perfect for college student. Call Monique at xxx-xxx-xxxx.

# Phone Screening Exercise

After placing the following ad in the local college newspaper, Mr. De Graff received a number of responses on his answering machine. As you read the responses, think about which people, if any, you would consider calling back; which ones, if any, you wouldn't; and why. Circle "yes," "no," or "maybe," depending on which answer is closest to your thinking. Rank the yeses in order of preference, with #1 as your first choice.

## The Advertisement

### **\$9/hr to Help Man with Disability**

Get experience working with a disability. Cool, active guy who uses wheelchair needs help with living activities, 6-8 hrs weekly. Just 10 min. from campus (car required), routine easy to learn. Needed now. Call Skip today & lv message, 000-000-0000.

## The Messages

- (1) "I'm calling about the ad for your live-in position. My name is Jennifer, but I'm really calling for a good friend of mine. He's really a nice, gentle guy who's interested in this job. Please call me back at xxx-xxxx and I'll be glad to tell you more about him."

Yes                  No                  Maybe

- (2) (Happy, bubbling, warm voice) "Hi, Skip. My name is Christy, and I saw your ad. I'm 28 years old and a first-year grad student in occupational therapy at SIU. I would like the experience of working with a person with a disability who has the positive attitude you seem to have from the ad you placed. I think I could learn a lot from working with you. Could you please call me at xxx-xxxx? Again, my name is Christy, and I hope to hear from you."

Yes                  No                  Maybe

- (3) "Ah, yeah (sniff), I'm callin' 'bout the disabled who wants someone (cough, cough) to care for him. My uncle was on crutches for a while, so working with them doesn't bother me none. Call me and we can talk 'bout what he needs. Thanks." (No name or phone number.)

Yes                  No                  Maybe

- (4) (Clear, pleasant voice) "Hello, I'm calling for Skip. I'm Sarah, a 38-year old massage therapist here in town. I would like to supplement my income and would be glad to provide you with references. Please call me at xxx-xxxx so I can learn more about your needs and the hours you require. Thank you very much."

Yes            No            Maybe

- (5) "My name is Heidi and I'd like to know more about the disabled gentleman who needs help. I think these people are so brave and inspiring. I've helped out several of them before. Yes, I have access to a real good car; my current boyfriend says I can use his. Please call me at xxx-xxxx, Suite 110."

Yes            No            Maybe

- (6) (Quiet, pleasant voice) "Hello, Skip, my name is Lea. I'm a 42-year-old single mom with two daughters. I've done some home health aide work before. If you would please return my call, I would like to discuss what needs you have. Please call me at xxx-xxxx. I'll look forward to hearing from you."

Yes            No            Maybe

- (7) (Rushed, very fast, mumbled message) "This is Erin, saw your ad, 'm interested, xxx-xxxx."

Yes            No            Maybe

- (8) (Nervous, respectful voice) "My name is Jenny. I'm a 19-year-old sophomore, pre-veterinary student at BU. I would like to speak with Skip about the help he needs. I grew up on a ranch in Wyoming. I'm used to getting up early, and I'm a hard worker. Please call me at xxx-xxxx."

Yes            No            Maybe

## Module 4

# Preparing to Staff Making a Staffing Plan, Developing a PA Schedule, and Interviewing Candidates

### Goal

- To assist participants in determining their staffing needs and in developing the communications skills needed to effectively interview potential candidates.

### Time

3.5 hours plus breaks

Activities	Teaching Methods	Time
4.1 Welcome & Homework Review	Large-group exercise	30 minutes
4.2 Making a Staffing Plan and PA Schedule	Discussion, individual work	45 minutes
4.3 The Interview Process	Interactive presentation	20 minutes
4.4 Interviewing Skills	Interactive presentation, pairs work, discussion	45 minutes
4.5 Role Play of an Interview	Role play, discussion	60 minutes
4.6 Closing	Discussion	10 minutes

### Supplies

- Participants completed homework (if applicable) identifying recruitment sources.
- Participants completed “Snapshot of Me” (See Activity 3.4)

## Module 4: Preparing to Staff

- Flip chart, easel, markers, tape
- Paper and pens or pencils

**Note:** An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use overheads, make sure you have the necessary equipment and screen. (Some PowerPoint slides are provided on your CD. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.)

### Handouts

- Handout 15: “Sherry’s Snapshot of Me” (from Module 3)
- Handout 21: “Sources to Recruit PAs”
- Handout 22: “Sherry’s Staffing Plan and PA Schedule”
- Handout 23: “My Staffing Plan and PA Schedule”
- Handout 24: “Hiring Personal Assistants”
- Handout 25: “In-Person Interviews: Key Objectives”
- Handout 26: “Structuring Your Interview”
- Handout 27: “Examples of Closed vs. Open-Ended Questions”
- Handout 28: “Make it Open”
- Handout 29: “Questions I’d Ask at My Interview”
- Handout 30: “Real Listening is...”
- Handout 31: “Active Listening”
- Handout 32: “Lead-Ins for Paraphrasing”
- Handout 33: “Tips on Ending an Interview”

### Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants’ physical needs.

Review the teaching materials for each activity.

If using projection equipment, set it up for optimum viewing by all participants.

Post “Workshop Two: Goal and Objectives” where everyone can see it.

#### Activity 4.1 Welcome & Homework Review

Prepare a flip chart page with the day’s agenda as shown in step 3.

Copy Handout 21, “Sources to Recruit PAs” for all participants.

Prepare a flip chart page based on Sources to Recruit PAs, as shown in step 5.

#### Activity 4.2 Making a Staffing Plan & Personal Assistant Schedule

Make copies of Handout 15, “Sherry’s Snapshot of Me,” in case anyone has forgotten theirs.

Copy Handout 22, “Sherry’s Staffing Plan and PA Schedule,” for all participants.

Copy Handout 23, “My Staffing Plan and Assistance Schedule,” for all participants.

### **Activity 4.3 The Interview Process**

Copy Handout 24, “Hiring Personal Assistants,” for all participants, and prepare a flip chart page based on the same information as shown in step 1.

Copy Handout 25, “In-Person Interview: Key Objectives,” for all participants.

Prepare a flip chart page of “Decisions Regarding Your Interview,” as shown in step 4.

Copy Handout 26, “Structuring Your Interview” for all participants.

### **Activity 4.4 Interviewing Skills**

Copy Handout 27, “Examples of Closed vs. Open-Ended Questions,” for all participants.

Copy Handout 28, “Make It Open,” for all participants and prepare a flip chart page with a few sample questions as shown in step 3.

Copy Handout 29, “Questions I’d Ask at My Interview,” for all participants.

Copy Handout 30, “Real Listening Is...” for all participants, and prepare a flip chart page with the same information as shown in step 7.

Copy Handout 31, “Active Listening,” for all participants. .

Copy Handout 32, “Lead-Ins for Paraphrasing,” for all participants, and prepare a flip chart page with some sample lead-ins as shown in step 9.

### **Activity 4.5 Role Play of an Interview**

Copy Handout 33, “Tips on Ending an Interview,” for all participants and prepare a flip chart page with the same information as shown in step 3.

### **Activity 4.6 Closing**

Prepare a flip chart page to record evaluation scores as shown in step 4.

*—Teaching Notes—*

*–Teaching Notes–*

## Activity 4.1 Welcome & Homework Review

30 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the workshop goal and objectives and the day's agenda;*

*Name at least two sources for recruiting personal assistants (PAs) that they had not considered before; and*

*Describe the strategies they would use for recruiting PAs through those sources.*

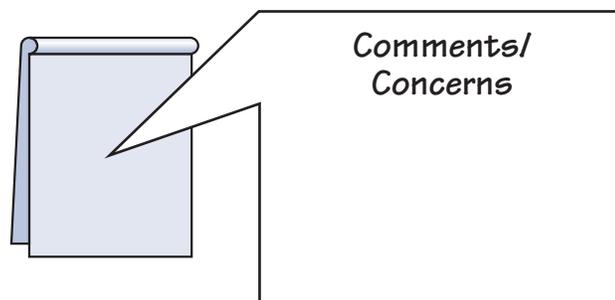
### Key Content

- The focus of this workshop is finding and hiring personal assistants. Today's activities concentrate on making a staffing plan and interviewing candidates.
- It is important to explore all possible recruitment options. For example, use:
  - Community and social networks
  - Advertising
  - Distributing flyers
  - Ideas that others offer
- Using an array of options to find a PA strengthens the likelihood that a consumer will have a large pool of applicants to select among. In addition to finding one regular PA, a large pool will enable the consumer to identify possible staff for back-up and emergency coverage.

### Activity Steps

#### Large-group exercise

1. Welcome participants back to the workshop. Ask if anyone has any comments and concerns regarding the last session. Write these on the flip chart to ensure they are attended to at the appropriate time.

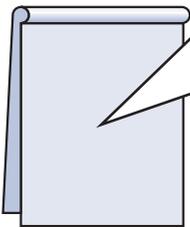


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## Module 4: Preparing to Staff

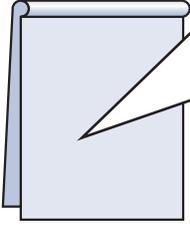
Activity 4.1, continued

- Referring to the prepared flip chart page (Workshop II: Goal and Objectives from Module 3), review the workshop goal, what was covered in the previous session, and the focus of today's workshop.
- Post the prepared flip chart with the day's agenda. Go over activities and break times. Make sure everyone is comfortable with the space and the room temperature.



Agenda	
Welcome & Homework Review	9:00–9:30
Preparing to Staff	9:30–10:15
The Interview Process	10:15–10:35
Break	10:35–10:50
Interviewing Skills	10:50–11:35
Conducting an Interview	11:35–12:35
Closing	12:35–12:45

- Remind participants about the homework assignment that they were given in Module 3:
  - Identify two sources for recruiting PAs that you had not considered before.
  - Find out how you would go about recruiting PAs through that source (e.g., putting a notice in a newsletter, posting an ad on a bulletin board, contacting an outreach committee).
- Distribute Handout 21, “Sources to Recruit PAs” and display the prepared flip chart page.



Sources to Recruit PAs					
Name of Source	Site/ Organization	How to Recruit There	Whom to Contact/Phone	Cost	Anything Else?

Ask participants:

*Did this exercise provide you with more ideas about where you can go to recruit candidates?*

*Do you have any questions about how to do this?*

- Wrap up by emphasizing that there are many places to recruit. Emphasize that it is good to network and to try a variety of venues in order to attract as many potential candidates as possible.

### ► Teaching Tip

If this workshop *is not* part of a series, welcome participants and use an icebreaker that will allow everyone to introduce him or herself and begin building relationships with one another. Explain that this workshop is intended to be highly interactive, and everyone will have a chance to express their thoughts, feelings, and experiences.

If participants did not attend Module 3 and you want to discuss recruiting prior to moving into the rest of Module 4, consider doing Activity 3.5 here. Otherwise go directly to Activity 4.2.

If this workshop *is* part of the series, and participants already know one another, consider an ice-breaker to energize participants and prepare them for the day.

### *–Teaching Notes–*

*–Teaching Notes–*

## Activity 4.2 Making a Staffing Plan & Personal Assistant Schedule

45 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Express clearly their daily, weekly, and occasional assistance and support needs;*

*Explain the importance of developing a staffing plan for personal assistants (PAs), based on their task needs and preferences;*

*Identify staffing options that could meet their assistance needs;*

*Create a staffing plan and a PA schedule that meets their coverage needs; and*

*Explain why it is important to have back-up and emergency coverage when participating in a consumer-directed program.*

### Key Content

- Remind participants (from discussions in Modules 2 & 3) that one of the most critical elements to developing an effective working relationship between a consumer and a PA is that the consumer needs to have a comprehensive and clear understanding of his or her assistance needs. And because it is, literally, *personal* assistance that is being provided, these assistance needs inevitably encompass preference and lifestyle issues as well as tasks that need to be performed.
- Developing a staffing plan and PA schedule involves identifying what kind of assistance the consumer needs and when it is needed. This helps the consumer know how many people he or she needs in a staffing pool. During the hiring process, consumers will find some people who are good for regular shifts; some for back-up shifts; and others for emergency assistance, when regular and back-up PAs are not available.

### Activity Steps

#### Discussion (15 minutes)

1. Explain that a staffing plan indicates how many staff members are required to cover the days/hours per week that a consumer needs assistance. Regularly scheduled staff should be able to cover all of the consumer's approved hours. Explain how back-up staff are necessary to cover hours when the regular staff person cannot come to work. For example, if someone worked Monday through Friday noon to 5, but every other Thursday needed two hours off, a back-up PA could fill in. Another example is when a consumer may need assistance outside of regularly scheduled shifts. Family and friends may provide back-up assistance.

Explain that a staffing plan helps consumers in the hiring process by clarifying how many people need to be hired and how many may be needed for back-up shifts.

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## Module 4: Preparing to Staff

Activity 4.2, continued

2. Note that a “Personal Assistant Schedule” details the exact hours and days each PA will work, and is based on the staffing plan. For the most part, this should be a stable weekly schedule, though there may be occasions where it is necessary to make changes, such as when the consumer has an appointment outside regularly scheduled hours or the PA has a conflict.

### ► Teaching Tip

Instructors may want to remind participants that flexibility can help in successful hiring. If the consumer would like someone from 8 AM to noon, but the ideal candidate can only take the job if the hours are 8:30 AM to 12:30 PM, the consumer may want to adjust his or her schedule.

3. Ask participants to take out Handout 15, “Sherry’s Snapshot of Me” from the Module 3.4. Distribute copies to those who don’t have it.

Remind participants that this was created using both the “Personal Care Planning List” and the “Personal Preferences Assessment” created for Sherry in Module 2.

On the left of Handout 15, “Sherry’s Snapshot of Me,” Sherry has written the things that must be done, and when they need to be done (daily, a few times a week, one a week, or occasionally). On the right, she’s put the approximate time it takes to do the task.

On the second page of her “Snapshot of Me,” Sherry has created a rough schedule of her PA needs. The “Snapshot of Me” can be a handy way to discuss basic needs during PA interviews.

4. Distribute Handout 22, “Sherry’s Staffing Plan and PA Schedule,” and explain that Sherry used her “Snapshot of Me” to identify different staffing options. Ask the group:

*With only 42 hours to fill, why didn’t Sherry choose to hire one full-time PA?*

*Why might option one be the most appealing to PA candidates?*

*What sorts of candidates might be available to fill the shifts in Sherry’s staffing plan?*

### ► Teaching Option

An alternative exercise would be to have participants brainstorm the pros and cons of:

- Using three Personal Assistants
- Using two Personal Assistants
- Using one live-in Personal Assistant

## Individual Work (25 minutes)

5. Ask participants to bring out their “Snapshot of Me” (Handout 16) to use as a reference.

### ► Teaching Tip

If participants didn’t complete a “Snapshot of Me” in Module 3, have them do this here (see Activity 3.4). This may increase the time for this Activity by 20 to 30 minutes.

6. Distribute Handout 23, “My Staffing Plan and PA Schedule,” and have participants complete both parts. Check in with each participant to make sure he or she understands how to determine the staffing options and then create a schedule. Assist where needed with writing challenges.

► **Teaching Tip**

Each participant needs to complete his or her own “Staffing Plan and PA Schedule.” However, if it seems that most will need a lot of help from facilitators to do this, you may be able to form small working groups and assign one facilitator to help each group.

**Discussion (5 minutes)**

7. After participants have completed Handout 23, “My Staffing Plan and PA Schedule,” come back together as a group. Ask if participants have a better understanding of their PA needs. Ask:

*How many people need more than one staff person?*

*Does this affect their recruitment plans?*

*What are some of the ways to have all of their needs met, even if their approved service hours are not as generous as they would like?*

—Teaching Notes—

*–Teaching Notes–*

## Activity 4.3 The Interview Process

20 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the objectives of the in-person interview; and*

*Begin to consider their answers to the key questions about the interview process: who, where, and what.*

### Key Content

- When hiring a personal assistant (PA), it is important for the consumer to:
  - Be constantly aware of his or her needs and preferences, and to clearly express those needs and preferences to each candidate.
  - Be conscious of what trade-offs and compromises are necessary in order to fill staffing needs.
  - Always be looking for the best match among the candidates who apply for the position.
  - Understand the legal dos and don'ts.
- During the interview, the consumer has four objectives:
  - Get a sense of the candidate as a personal assistant (PA) and as a person to determine if he or she is a good match.
  - Give the candidate a good (general) sense of the job.
  - Show the candidate that this is a job he or she would enjoy.
  - Start the relationship-building process.
- In structuring the interview, the consumer needs to decide: *Who* will conduct the interview? *Where* it will be conducted? and *What* will be discussed?

### Activity Steps

#### ► Teaching Option

Consider starting this activity with an "Opinion Poll." This can be an energizer for the group. Use the statement:

*Interviews are a waste of time. People just tell you what you want to hear so they can get your job.*

Follow the steps to present and discuss an "Opinion Poll" that have been fully outlined in Activity 2.2, 2.4, and 3.2.

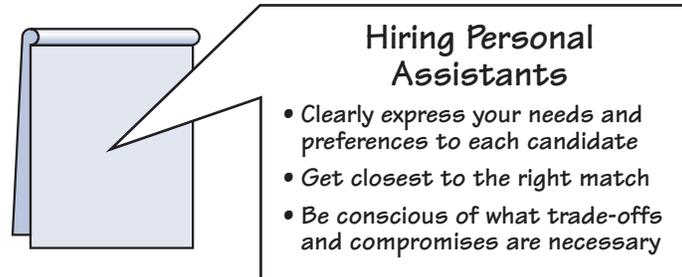
If you choose to begin Activity 4.3 with an "Opinion Poll," you may need to adjust the time (and agenda) to allow for discussion.

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Activity 4.3, continued

### Interactive Presentation

1. Display the prepared flip chart, “Hiring Personal Assistants,” and distribute Handout 24. Review each point.

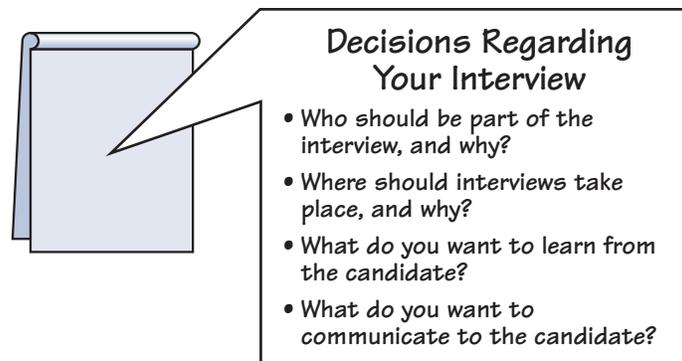


2. Remind participants that their hiring goal is to find the best possible match between their needs and preferences and the personality, skills, and availability of potential personal assistants. Ask participants:

*What are the goals of an in-person interview?*

3. After they share a few ideas, distribute Handout 25, “In-Person Interview: Key Objectives.” Briefly review each point.

4. Post the prepared flip chart page “Decisions Regarding Your Interview.”



Ask participants to brainstorm ideas for each question and record their responses. Be sure to spend adequate time on the *last* questions.

5. Distribute Handout 26, “Structuring Your Interview—The Three W’s: Who, Where, What.” Briefly review the content of this handout, emphasizing anything that was not mentioned during step 4 (the brainstorm).

6. Summarize this activity by emphasizing that interviewing is a key step in finding a PA who is a good match. Empathize with participants by telling them that many people are uncomfortable with this part of the hiring process. Let participants know that in the next series of exercises, they’ll be able to practice some communication skills that will make their interviews more successful.

## Activity 4.4 Interviewing Skills

45 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe active listening, including the importance of being aware of body language;*

*Explain the difference between closed and open-ended questions and the importance of using open-ended questions in candidate interviews;*

*Create open-ended questions for interviews; and*

*Describe paraphrasing as a two-way communication skill and explain its importance in interviewing candidates.*

### Key Content

- Good listening is essential to clear, effective communication. In interviewing candidates, it is important to be a good listener and to also be aware of whether the candidate listens well.
- Good listening is active, not passive. Active listening is a skill that must be learned and practiced since it is not something we were taught or often experience. It involves:
  - Using attentive body language and paying attention to the body language of others (body language refers to the way people communicate nonverbally through postures, facial expressions, and gestures).
  - Asking open-ended questions in order to gather information.
  - Using paraphrasing to ensure mutual understanding.
- The communication skills of asking open-ended questions and paraphrasing are good ways to learn about PA candidates.
- Closed questions usually generate facts or yes-or-no answers. Open-ended questions encourage responses that go into feelings, opinions, or explanations. Open-ended questions usually begin with *what*, *how*, or *why*?
- Paraphrasing involves stating in your own words what you think someone else has said. This skill is helpful in clarifying and gathering information and reflecting back what you have understood. Three main benefits of paraphrasing are that people appreciate feeling heard and understood, miscommunication can be prevented, and it can help people to remember what was said. Asking a candidate to restate (paraphrase) his or her understanding of key issues described by the employer is also a good way to test a candidate's listening skills.

– Continued next page

### Activity Steps

#### Interactive presentation (10 minutes)

1. Explain to participants that communication includes verbal and nonverbal techniques. Emphasize that this works two ways—i.e., people communicate *with others*, and are communicated to by others, both verbally and nonverbally.

Explain that by learning effective communication techniques, consumers can more effectively screen candidates. Emphasize that learning as much information as possible about a candidate strengthens the consumer's ability to make a good hiring choice. Effective communication techniques include helpful ways of asking questions (open-ended works better), repeating answers in your own words to check that you understood (paraphrasing), and being attentive. These communication skills are also vital to building a good working relationship between a consumer and personal assistant (PA) after hiring.

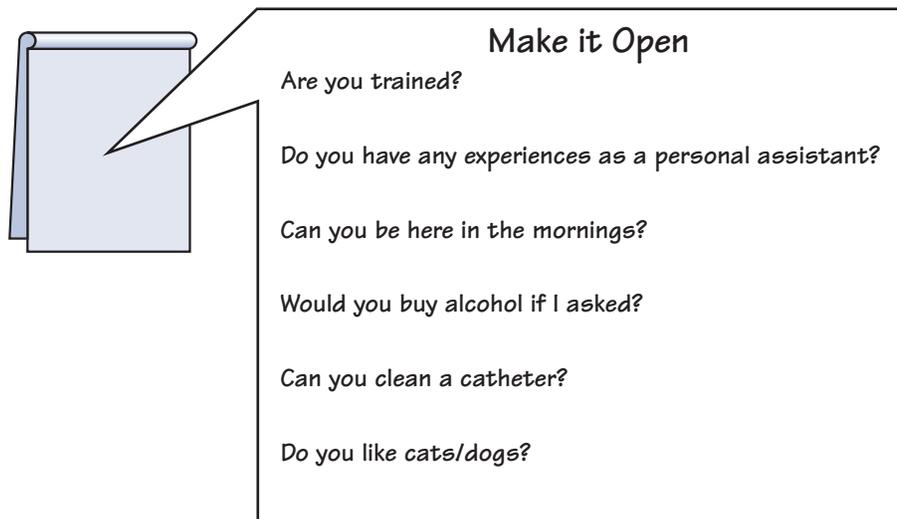
2. Explain the differences between “closed vs. open-ended questions.” Distribute Handout 27, “Examples of Closed vs. Open-Ended Questions.” (If using overhead or LCD projection, you may want to display this handout as well.)

Review the examples. After each, ask:

*What kinds of answers are you likely to receive with each?*

*How do you imagine an interviewee might react to each type of question?*

3. Distribute Handout 28, “Make It Open,” and display the prepared flip chart page with several examples.



Ask participants to practice making open-ended questions using the closed questions provided on the flip chart and Handout 28. Write their sample questions on the flip chart so that you can use them in the role-play interview that follows (Activity 4.5).

Continue until you think participants understand the concept of open-ended questions. Also keep this flip chart page available for steps 5 and 10 of this activity.

► **Teaching Tip**

Example: A consumer might prefer a PA who can read. Examples of open-ended questions to explore that skill: *What kind of books do you enjoy? What have you read lately?*

**Pairs Work (15 minutes)**

4. Ask participants to form pairs. Ask them to refer to their own “Snapshot of Me” (Handout 16), and to help each other form open-ended questions for an interview, based on their own preferences. Ask each person to create and write down at least two sample “open-ended” questions. Distribute Handout 29, “Questions I’d Ask At My Interview,” so participants can keep notes.

► **Teaching Tip**

Participants’ level of functioning may require that this activity be modified; the work in pairs can also be done effectively in the large group led by the facilitator.

5. Ask each pair to share one open-ended question. Go around the group until each pair has shared at least two questions.

Add these new “open-ended” questions to the flip chart page started in step 3 above, for use in the role-play interview (Activity 4.5). Suggest to participants that they record questions they like on their handout under “Good Questions from Classmates.”

► **Teaching Tips**

Ask participants to determine whether the new questions provided by participants are closed or open-ended. If some are identified as closed, ask a volunteer to restate the question as an open-ended one. Be gentle with this rephrasing process. Initially, many people find it difficult to grasp the difference between closed and open-ended questions.

It is also important to appreciate that some of the questions that participants may ask—or may wish to ask while remaining silent—are very personal (e.g., “How do you feel about changing catheters?”). Some participants may not be comfortable sharing such personal questions in a large group unless this kind of disclosure is appropriately modeled. Trainers are encouraged to model how to ask personal questions appropriately.

**Discussion (20 minutes)**

6. Introduce the topic of “checking for understanding.” Ask:

*What is the purpose of listening?*

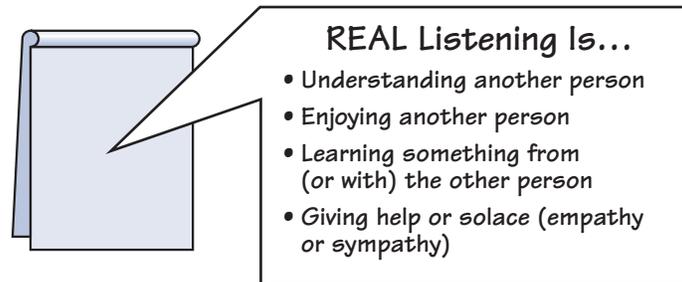
*How is listening different from hearing?*

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## Module 4: Preparing to Staff

Activity 4.4, continued

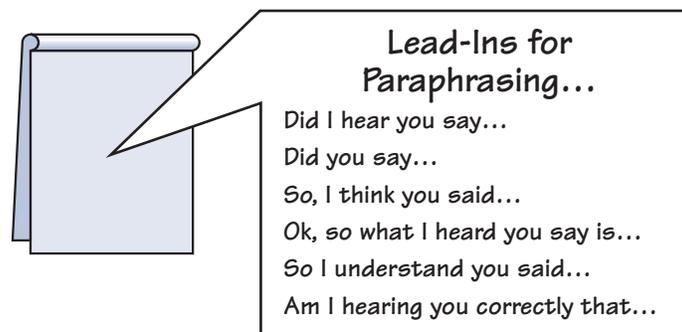
7. Distribute Handout 30, “Real Listening Is...” and display the prepared flip chart. Review the bullet points.



8. Distribute Handout 31, “Active Listening,” and review the points made.

9. Introduce paraphrasing as an important communication technique that allows the listener to check his or her understanding of what a speaker has said.

Distribute Handout 31, “Lead-Ins for Paraphrasing,” and display the prepared flip chart with a few of the same examples.



10. Refer to the “participant-generated” open-ended questions created in steps 3 and 5 above. Pose one of those questions to the large group, asking for a volunteer to respond. Then paraphrase the response using one of the lead-in statements.

### ► Teaching Tips

An example might go as follows:

*How do you feel about taking cooking instructions from me?*

Candidate response:

*I'm a great cook, I don't think I'll need instructions.*

Paraphrased response:

*So you are saying that you won't need me to give you instructions?*

11. Ask for a volunteer to ask the trainer a question. Respond appropriately, and have the questioner paraphrase your answer.

### ► Teaching Tips

If the group appears to have difficulty with the concept of paraphrasing, practice with some additional questions. Let participants know that they will have a chance to try out this skill during the interview role plays in the next activity.

**12.** Summarize this experience by emphasizing for participants that paraphrasing skills can be used both by consumers and personal assistant candidates to ensure that important details are accurately communicated. During an interview, for example, a consumer may want to ask a candidate to repeat back key information concerning job requirements in his or her own words to ensure that the candidate has understood.

*—Teaching Notes—*

*–Teaching Notes–*

## Activity 4.5 Role Play of an Interview

60 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the impact of active listening, including asking open-ended questions and paraphrasing, on the interview process;*

*Demonstrate active listening skills in a role-play interview; and*

*List the important steps for closing an interview.*

### Key Content

- Practicing active listening skills in interview role plays provides participants with an opportunity to develop their skills in a safe environment.
- Asking open-ended questions and paraphrasing during an interview allows the consumer to explore fully whether the candidate will make a good match.
- When ending an interview, it is important that both the consumer (interviewer) and PA candidate understand what the interviewer will do next (e.g., see two more candidates and decide whom to call back for a second interview) and what the candidate should do next (e.g., think about the job's responsibilities and call the interviewer at a particular time the next day if he or she is still interested or has additional questions).
- Second- and third-best candidates can be considered for back-up and emergency coverage.

### Activity Steps

#### Role play (10 minutes)

1. Referring to interview questions created by the group in Activity 4.4, role-play with a co-instructor an interview between a consumer and a PA candidate. Be sure to use active listening, including open-ended questions and paraphrasing in the simulation, but also act out some undesirable communication styles such as closed questions to discuss with participants.

#### ► Teaching Tips

To develop the fictional candidate role, use one of the respondents who responded in the phone screening exercise (Activity 3.7, Handout 20).

Model steps for ending an interview, as outlined in Handout 33, "Tips on Ending an Interview," which will be discussed after the role play.

#### Discussion (10 minutes)

2. After the role play, facilitate a discussion by asking participants:

*Overall, how did the interview compare with the interviews you've conducted?*

– Continued next page

## Module 4: Preparing to Staff

Activity 4.5, continued

*What did you notice about the consumer?*

*What did you notice about the candidate?*

*Which of the consumer's questions were most effective in eliciting information?*

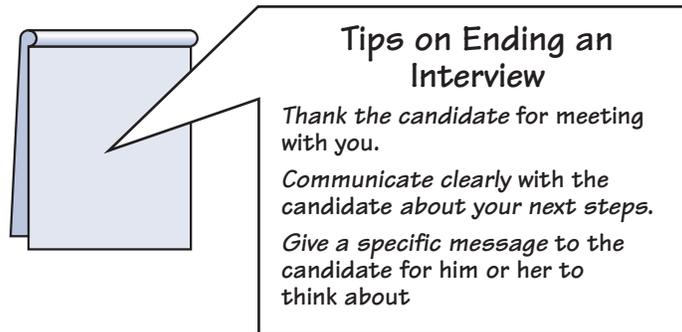
*Which were not very effective, and why?*

*Did you notice paraphrasing during the interview? When?*

*What did you notice about the consumer's and candidate's nonverbal communication?  
Give examples.*

*Did the consumer and PA candidate each demonstrate active listening? Were there times they did not?*

**3.** Ask what participants noticed about how the “interviewer” ended the interview. Distribute Handout 33, “Tips on Ending an Interview,” and display a prepared flip chart page based on the same information. Compare the tips with what happened in the role play.



### Role Play (30 minutes)

**4.** Explain that, in order to practice interviewing skills, participants will have a chance to role-play conducting an interview. Ask for a volunteer to role-play the consumer with the instructor playing the candidate. Refer to the *Telephone Pre-Screening Exercise* from Activity 3.7, and choose one of the candidates from this exercise for the consumer to interview.

**5.** After positioning the “consumer” and the “candidate” for the role play, ask the consumer:

*Who would you like to have with you at this interview, if anyone? (If they want someone with them, ask another participant to join in.)*

*Where will this interview be conducted?*

*What points do you want to be sure to cover—e.g., from your PA schedule or your personal preferences assessment?*

#### ► Teaching Tips

If you have two instructors, one of them can play the role of the candidate in these role plays, while the other observes and leads the discussion.

Set up the role play in a place in the room where everyone can hear and see. Remind the players to speak loud enough for everyone to hear them.

6. Conduct the role-play for about five minutes and then stop. Acknowledge that the interview is not finished, but this is a good time to discuss where the interview is going and if there are ways to improve the communication.

► **Teaching Tips**

Remind participants about using open-ended questions to solicit more information.

If the "consumer" gets stuck, the instructor who is facilitating discussion can gently put her hand on the consumer's shoulder and ask participants to help out by offering suggestions on questions to ask. (If the group has never seen this technique before, explain that putting your hand on the role-player's shoulder is a symbolic sign that conveys, "You're not alone; I'm here to help you out." Participants may become nervous or frustrated in the role-play and this often has a calming effect.

7. Ask the consumer:

*How did you feel about the quality of the information you were getting from the candidate?*

*Could you make a decision now about whether this is someone you would want to hire?*

If yes, ask the group which questions were most revealing.

If no, ask the group what they still want to know and what questions they would add.

► **Teaching Tip**

If the first interview was successful in the first five minutes, repeat the exercise with one or two additional volunteers.

8. If the interview is not complete, ask the consumer to continue the role play for a few more minutes using the questions suggested by the group, trying to elicit the information that he or she still wants to know.

9. End the role play and debrief. First ask the interviewer(s) to reflect on their interview(s). Ask:

*What questions were most helpful?*

*Would the interviewer(s) consider hiring the candidate(s)?*

Next ask the group if they were happy with the quality of information that the interviewer(s) solicited. Ask:

*What observations do you have about the communication skills used?*

Next ask the candidate,

*Would you want to work for this consumer? Why or why not?*

► **Teaching Option**

If more than six consumers are participating in the workshop, you may want to split into two groups to do the role play exercise. Have one facilitator work with each group, and bring the groups back together for the final discussion.

– Continued next page

## Module 4: Preparing to Staff

Activity 4.5, continued

### Discussion (10 minutes)

**10.** Thank the volunteers. Wrap up by reinforcing what the participants did well, in terms of interviewing steps and skills. Remind them of the important points regarding ending the interview:

- Thank the candidate for his or her time and interest—no matter how well the interview went.
- Explain next steps, including when you will get back to them regarding your decision.
- Leave candidates with a clear message for consideration (e.g., asking the applicant to think carefully about the responsibilities and commitment of the job).

**11.** Facilitate a short discussion about back-up and emergency care and why it is important to end interviews positively and think ahead about future staffing needs. Ask participants for ideas on using the second- and third-best candidates.

*–Teaching Notes–*

## Activity 4.6 Closing

10 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Identify their level of comfort in screening and interviewing candidates; and*

*State what they will be working on at home before the next workshop and next steps for additional training and follow up.*

### Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group. In addition, the end of day wrap-up allows participants to share what they learned, providing an informal evaluation for the instructor to determine what parts of the workshop were most useful.

### Activity Steps

#### Discussion

1. Explain that today's workshop is coming to an end. Ask participants what concerns they still have about interviewing PA candidates. Make sure everyone has a chance to speak. Ask if they'll now feel more confident about interviewing PA candidates.
2. Explain to participants that with practice, their interview skills will improve. They can practice good communication skills, particularly asking open-ended questions and paraphrasing, in all types of situations, but before the next session, you are asking them to make a special effort to practice a PA candidate interview. Then explain the homework assignment.

#### Homework

Ask someone you feel comfortable with (friend or family member) to role-play an interview with you. Have your partner play the PA candidate. Using open-ended questions from Activity 4.4, spend about 10 minutes doing an interview. Think about what questions were most successful in helping you to determine if this person would be a good match for you.

3. Explain that the next session will focus on the steps involved in hiring the personal assistants they select after interviewing candidates, including checking references, making an offer and rejecting candidates, and developing a hiring agreement.
4. Conduct a quick evaluation by asking participants:

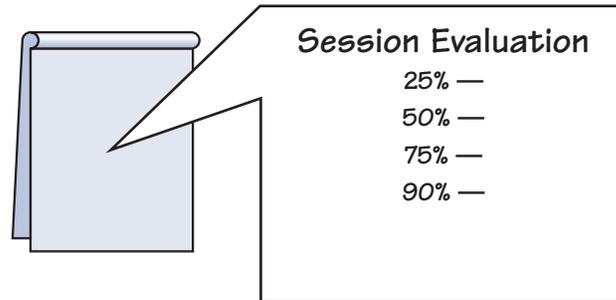
*How much of today was a good use of your time?*

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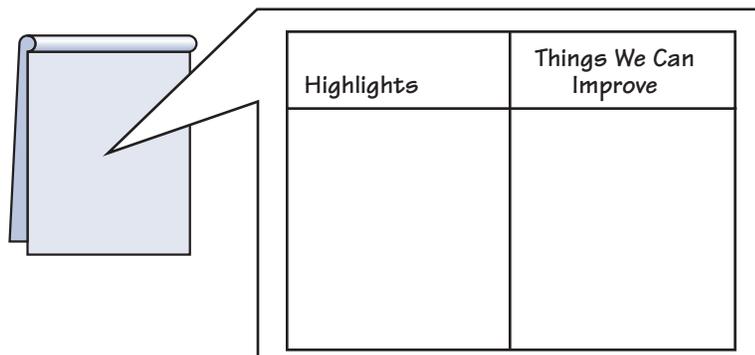
## Module 4: Preparing to Staff

Activity 4.6, continued

Invite them to vote for the percentages you have listed on a flip chart.



5. After they've voted and you've recorded the responses (praising those who give lower ranking for their honesty), ask them to tell you what worked really well for them—the highlights, and what they think could be better—the 'low-lights.' Record ALL answers on the flip chart.



Thank participants who give you critical feedback and emphasize that it will help you make future sessions better for participants.

A fun way to draw the session to a close is to call for a motion to adjourn, and invite all who agree that it's time to adjourn to say, "Aye!!"

*—Teaching Notes—*

# **EMPLOYING, SUPPORTING, AND RETAINING YOUR PERSONAL ASSISTANT**

## **A Workshop Series for People with Disabilities**

### **Handouts**

**Workshop II: Module 4  
Preparing to Staff: Making a Staffing Plan,  
Developing a PA Schedule, and Interviewing  
Candidates**

## Sources to Recruit PAs

Name of Source, Site or Organization	How to Recruit There	Whom to Contact and Phone Number	How Much It Costs	Anything Else?
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## Sherry's Staffing Plan and PA Schedule

### Staffing Plan

Total allotted hours (paid for by program):	42
Total # of hours needed (based on PA planning list):	42

### Staffing Possibilities:

#### Option One

Hire 3 part time Personal Assistants:

- One PA to work p/t in the mornings (20 hours)
- One PA to work p/t in the evenings (10 hours total)
- One PA to work p/t on the weekends (12 hours)

#### Options Two:

Hire 2 part time Personal Assistants:

- One PA to work evenings and weekends (22 hours)
- One PA to work morning/afternoons (20 hours)

#### Option Three:

Hire one live in PA:

The live in would get paid for the 42 hours, and provide extra services as needed in exchange for a place to live.

Sherry decides on **Option One**, and will seek to fill those positions. In addition, Sherry will seek to find 3 Back-Up Personal Assistants who would be willing to be oriented in case she needs to cover a shift her Regularly scheduled PA's cannot work.

### Personal Assistance Schedule (based on Option One)

	Personal Assistant One	Personal Assistant Two	Personal Assistant Three
<b>Monday</b>	9:00 am- 1:00 pm	6:00- 8:00 pm	
<b>Tuesday</b>	9:00 am- 12:00 pm	6:00- 8:00 pm	
<b>Wednesday</b>	9:00 am- 2:00 pm	6:00- 8:00 pm	
<b>Thursday</b>	9:00 am- 2:00 pm	6:00- 8:00 pm	
<b>Friday</b>	9:00 am- 12:00 pm	6:00- 8:00 pm	
<b>Saturday</b>			11:00 am- 5:00 pm
<b>Sunday</b>			11:00 am- 5:00 pm
<b>Totals Hours</b>	20	10	12

## My Staffing Plan and PA Schedule

### Staffing Plan

Total allotted hours (paid for by program): \_\_\_\_\_

Total number of hours needed (based on Snapshot of Me): \_\_\_\_\_

#### Staffing Possibilities:

Option One

Options Two:

Option Three:

First Choice Option: \_\_\_\_\_

Second Choice Option: \_\_\_\_\_

Number of Back Up PA's desired: \_\_\_\_\_

### Personal Assistance Schedule (based on Option One)

	Personal Assistant One	Personal Assistant Two	Personal Assistant Three	Personal Assistant Four
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				
Totals Hours				

## **HIRING PERSONAL ASSISTANTS**

- ◆ **Be aware of your needs and preferences, and clearly express your needs and preferences to each candidate**
- ◆ **Get closest to the right match given the candidates who apply for the position**
- ◆ **Be conscious of what trade-offs and compromises are necessary in order to fulfill staffing needs**

## IN-PERSON INTERVIEWS

### Key Objectives

- ◆ Give the candidate a general sense of the job
- ◆ Show the candidate this is a job he or she would enjoy
- ◆ Get a sense of the candidate as a PA and as a person
- ◆ Start the relationship-building process
- ◆ Learn what skills the candidate brings to the job of PA
- ◆ Give the candidate a chance to ask questions – if he or she has them.

# Structuring Your Interview

## *The Three W's: Who, Where, What*

### **Who does the interview?**

- Consumer alone?
- With family member?
- With current PA?
- Other?

### **Where does the interview take place?**

- Consumer's home?
- Another location?

### **What are you looking for in a candidate?**

- PA's skills
- PA's work experience and training
- PA's attitudes
- PA's personal qualities
- Other

### **What do you want to communicate to the candidate about the job?**

- Salary
- Schedule
- Flexibility
- Benefits

## EXAMPLES OF CLOSED VS. OPEN-ENDED QUESTIONS

### Drugs/Alcohol:

**Closed:** Would you work with someone who drinks?

**Open:** What do you think about people who drink or do drugs?

### Personality/Friendliness:

**Closed:** Do you have a lot of friends? Do you like to go out?

**Open:** How do you spend your free time? How would your best friend describe you?

### Sense of Humor/ Personality:

**Closed:** Do you have a sense of humor?

**Open:** What makes you laugh?

### Cooking:

**Closed:** Do you like to cook? Can you cook? Would you be able to cook for me?

**Open:** If you were to prepare your favorite meal for me, what would it be?

### Flexibility/ Availability:

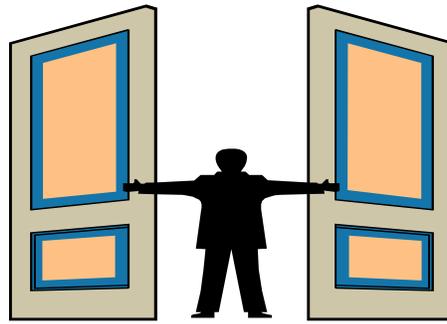
**Closed:** Do you think you have time to do this job given my schedule?

**Open:** What are some of responsibilities in your life right now? How will the schedule I require fit in with your current responsibilities?

### Computer:

**Closed:** Can you use the computer?

**Open:** How do you feel about working with computers? What programs do you use on the computer?



## Make It Open

- Are you trained?
- Do you have any experiences as a personal assistant?
- Can you be here in the mornings?
- Would you buy alcohol if I asked?
- Can you clean a catheter?
- Do you like cats/dogs?
- Can you cook?
- **Can you work weekends?**
- Do you like going out?
- Have you done drugs?
- Can you clean?
- Can you clean a wheelchair?

Come up with more questions that are relevant for your particular situation:

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# Questions I'd Ask at My Interview

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Good Questions Classmates Plan to Use (and I want to remember):

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## ***REAL* Listening Is...**

*Based on the intention to do one of four things:*

- ◆ Understand another person
- ◆ Enjoy another person
- ◆ Learn something from (or with) the other person
- ◆ Give help or solace (empathy or sympathy)



# Active Listening

- ◆ Good listening is essential to clear, effective communication and is of primary importance in interviewing and hiring PAs.
  
- ◆ Good listening is active, not passive. Active listening is a skill that must be learned and practiced since it is not something we were taught or often experience. It involves:
  - Using attentive body language (body language refers to the way people communicate nonverbally through postures, facial expressions, and gestures).
  - Asking open-ended questions in order to gather information
  - Using paraphrasing to ensure mutual understanding.
  
- ◆ *Active* listening (i.e., listening with full attention to another person—including attentive body language) is a vital underlying skill in interviewing and hiring PAs for the following reasons:
  - When people listen with their full attention, they remember and understand more of what is being communicated. On the other hand, when they listen inattentively, they miss a great deal of what is being communicated.
  - Being actively listened to feels caring and helpful to the speaker. Not being listened to, or being listened to in an inattentive manner, feels hurtful and unhelpful. A candidate is more likely to be interested in a position and remain in the position once hired if he or she feels listened to by an employer.

# Lead -Ins for Paraphrasing

DID I HEAR YOU SAY.....

DID YOU SAY.....

SO, I THINK YOU SAID.....

OK, SO WHAT I HEARD YOU SAY IS.....

SO I UNDERSTAND YOU SAID.....

AM I HEARING YOU CORRECTLY THAT.....

ARE YOU SAYING THAT.....

AM I HEARING YOU CLEARLY THAT.....

I BELIEVE THAT YOU ARE SAYING.....

SO, YOU'RE SAYING.....

OK, LET ME SEE IF I GOT WHAT YOU SAID....

## Tips on Ending an Interview

- ◆ **Thank** the candidate for meeting with you.
  
- ◆ **Communicate clearly** with the candidate **about your next steps** (e.g., “I expect to interview 2 more candidates and hope to make a decision by next week” or “I expect to make a preliminary decision by Friday and would like any serious candidate to meet with me and my current PA as a next step in the process.”)
  
- ◆ **Give a specific message** to the candidate for him or her to think about (e.g., “I want you to think a little more about the responsibilities for this position and give me a call tomorrow between 10 a.m. and 2 p.m. if you’re still interested.”)

# Module 5

## Hiring Personal Assistants

### Goal

- To provide participants with the knowledge and skills needed to evaluate final candidates, make job offers, and politely turn down those who are not qualified.

### Time

3 hours, 15 minutes, plus a break

Activities	Teaching Methods	Time
5.1 Welcome & Homework Review	Discussion	15 minutes
5.2 Checking References	Discussion, pairs work	45 minutes
5.3 Making an Offer	Interactive presentation, pairs work, discussion	30 minutes
5.4 Sealing the Deal: Developing Work Agreements	Discussion, individual work	60 minutes
5.5 Overview of Consumer-Directed Program Requirements	Interactive presentation	30 minutes
5.6 Closing	Discussion	15 minutes

### Supplies

- Flip chart, easel, markers, tape
- Paper and pens or pencils
- Copies of “Hiring and Managing Personal Assistants,” the state guide for participants in consumer-directed programs.

## Module 5: Hiring Personal Assistants

**Note:** An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use overheads, make sure you have the necessary equipment and screen. (Some PowerPoint slides are provided on your CD. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.)

### Handouts

- Handout 34: “Sample Reference Questionnaire”
- Handout 35: “Tips on Making an Offer”
- Handout 36: “Consumer/Personal Assistant Work Agreement”
- Handout 37: “Actions That Help Avoid Unnecessary Coverage Emergencies”
- Administrative forms for your consumer-directed program (see Activity 5.5). These forms must be secured locally. Instructors can contact the county or area agency for copies of the appropriate forms.

### Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants’ physical needs.

Review the teaching materials for each activity.

If using projection equipment, set it up for optimum viewing by all participants.

Post “Workshop Two: Goal and Objectives” where everyone can see it.

#### Activity 5.1 Welcome & Homework Review

Prepare a flip chart page with the day’s agenda, including breaks, as shown in step 3.

#### Activity 5.2 Checking References

Copy Handout 34, “Sample Reference Questionnaire,” for all participants.

#### Activity 5.3 Making an Offer

Copy Handout 35, “Tips for Making an Offer,” for all participants.

Prepare a flip chart with the “What If” Scenarios as shown in step 2.

#### Activity 5.4 Sealing the Deal: Developing Work Agreements

Copy Handout 36, “Consumer/Personal Assistant Work Agreement,” and Handout 37, “Actions That Help Avoid Unnecessary Coverage Emergencies.”

### **Activity 5.5 Overview of Consumer-Directed Program Requirements**

Copy any additional program related materials you are handing out (Administrative Forms) for all participants.

Program requirements differ by geographic area. Appropriate information will need to be gathered locally and, for this session, should be distributed to consumers in writing. The instructor for this session should be very familiar with the consumer-directed program's policies and procedures and be prepared to talk briefly about it with the group.

### **Activity 5.6 Closing**

Prepare a flip chart page to record evaluation scores as shown in step 3.

*–Teaching Notes–*

*–Teaching Notes–*

## Activity 5.1 Welcome & Homework Review

15 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the workshop goal and objectives and the day's agenda; and*

*Explain why asking open-ended questions and paraphrasing are essential to the process of interviewing and hiring PAs.*

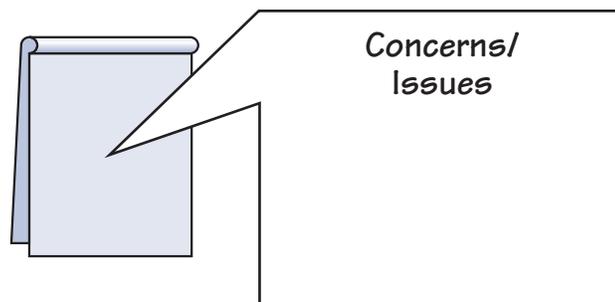
### Key Content

- The focus of today's activities is on the formal aspects of hiring a personal assistant.
- Active listening skills, particularly asking open-ended questions and paraphrasing, improve with practice.
- Using these skills during the recruitment and hiring process makes it more likely that the consumer will find a good match.

### Activity Steps

#### Discussion

1. Welcome everyone back to the workshop. Ask if anyone has any concerns/issues that have come up since the last meeting. Write these on a flip chart page to return to at the appropriate time.



#### ► Teaching Tip

If this workshop is not part of a series, welcome participants and use an icebreaker that will allow everyone to introduce themselves and begin building relationships with one another. Explain that the workshop will be highly interactive, and everyone will have a chance to participate by sharing their thoughts, feelings, and experiences. Then skip to Activity 5.2.

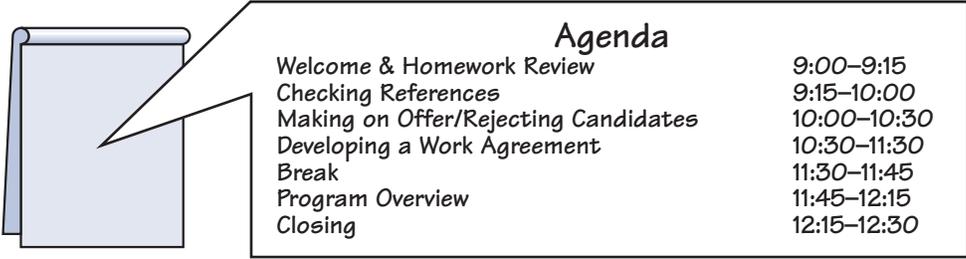
If this workshop is part of the series, and participants already know one another, consider an ice-breaker to energize participants and prepare them for the day.

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## Module 5: Hiring Personal Assistants

Activity 5.1, continued

- Referring to the prepared flip chart page (Workshop II: Goal and Objectives from Module 3), review the workshop goal, what was covered in the previous sessions, and the focus of today's workshop.
- Post the prepared flip chart with the day's agenda. Go over activities and break times. Make sure everyone is comfortable with the space and the room temperature.



Agenda	
Welcome & Homework Review	9:00–9:15
Checking References	9:15–10:00
Making an Offer/Rejecting Candidates	10:00–10:30
Developing a Work Agreement	10:30–11:30
Break	11:30–11:45
Program Overview	11:45–12:15
Closing	12:15–12:30

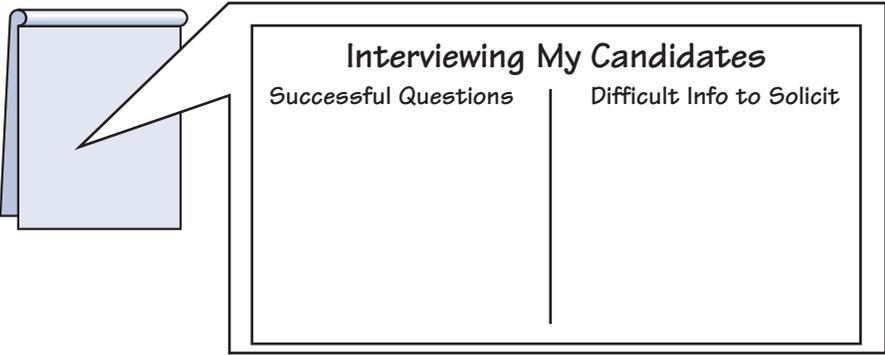
- Ask participants about their homework assignment. Ask each person:

*What questions did you ask your "candidate"?*

*What questions most successfully solicited information that would help you decide if the candidate was a good match?*

*Was there information you were trying to solicit but weren't successful getting?*

- Write answers for the last two questions on a flip chart that is divided into two columns: "Successful Questions" on the left and "Difficult Information to Solicit," on the right.



Interviewing My Candidates	
Successful Questions	Difficult Info to Solicit

- Ask if anyone has suggestions for questions that might help participants solicit some of the information that was difficult to get.
- Wrap up by praising everyone for taking the time to practice and helping each other become better interviewers. Note that the rest of this session will focus on the next step in the process of putting together a staff: hiring.

## Activity 5.2 Checking References

45 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Explain why it is always important to check references before hiring a candidate;*

*Explain the pros and cons of asking for written references vs. telephone references;*

*Identify the kinds of people who should be asked for references; and*

*Articulate three questions that are essential to ask any reference.*

### Key Content

- Interviews are one way to find out about a candidate's skills, personality, and job history. A second way is to ask for references.
- References are a good way to make sure your impressions of a candidate align with what others who have worked with the candidate have experienced.
- References from previous employers, particularly if the candidate worked as a PA, provide the best perspective on a candidate's reliability as a worker. For applicants without formal work experience, find someone who knows the person well through an activity that requires commitment and follow through; for example, a professor, others with whom the person has worked on volunteer or community activities, or a minister or other religious leader.
- When asking questions of a reference, open-ended questions are likely to solicit more useful information.

### Activity Steps

#### Discussion (20 minutes)

1. Ask participants if they have ever been asked for a reference or solicited a reference from someone.

2. Ask participants:

*What does your experience tell you about why you might want to ask for references when hiring a PA?*

The responses to look for will reflect the following: To make sure their impression of the candidate aligns with the experience of others.

3. Ask:

*What kinds of people might be good people to solicit references from?*

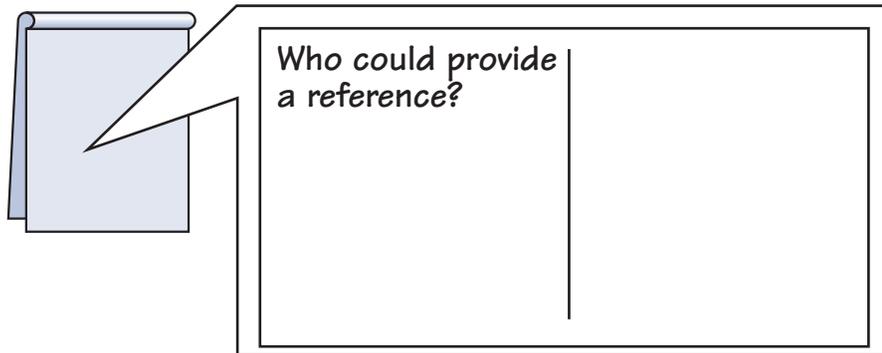
Look for responses such as: a former employer, a teacher, a friend, a coach, a member of the clergy, etc.

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## Module 5: Hiring Personal Assistants

Activity 5.2, continued

Write responses on a flip chart, down the left hand column.

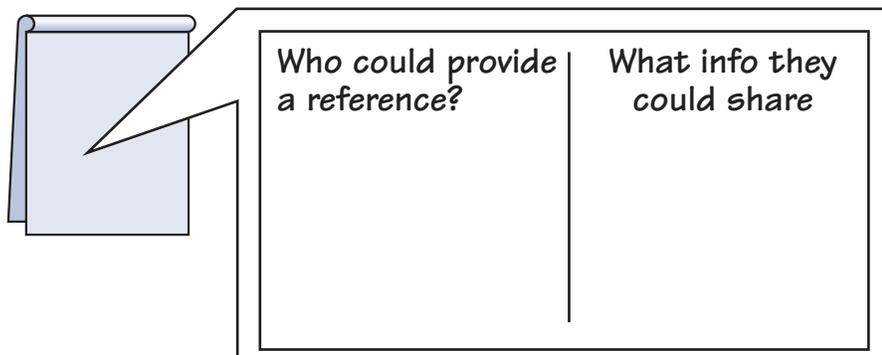


A flip chart template consisting of a light blue notepad icon on the left and a large rectangular box on the right. The box is divided into two columns by a vertical line. The left column contains the text "Who could provide a reference?".

4. For the people listed, ask:

*What might the reference know about the candidate that the consumer would like to know?*

Write responses on the flip chart as well.

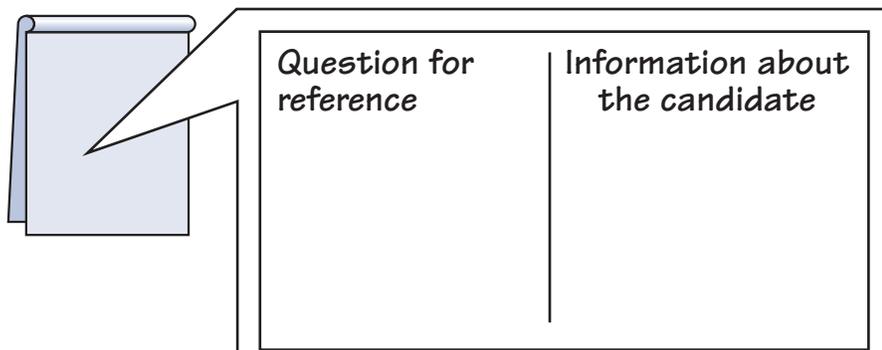


A flip chart template consisting of a light blue notepad icon on the left and a large rectangular box on the right. The box is divided into two columns by a vertical line. The left column contains the text "Who could provide a reference?" and the right column contains the text "What info they could share".

### Pairs Work (15 minutes)

5. Divide participants into pairs. Ask them to think of two open-ended questions that they would want to ask a reference. (Give them about 5 minutes.)

6. Bring the group back together and ask one pair to tell the group one of their questions. Write the question on a flip chart. Ask what the question will tell the consumer about the candidate.

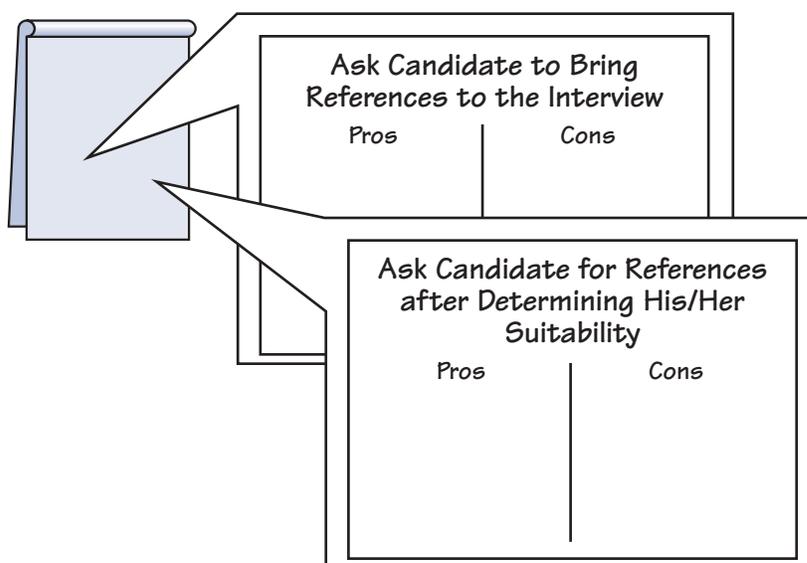


A flip chart template consisting of a light blue notepad icon on the left and a large rectangular box on the right. The box is divided into two columns by a vertical line. The left column contains the text "Question for reference" and the right column contains the text "Information about the candidate".

7. Go around asking other pairs to volunteer questions, following the same process until all the questions have been solicited.
8. If any of the questions are not open-ended, ask the group if they can reword them to make them open-ended.
9. Distribute Handout 34, "Sample Reference Questionnaire," for participants' resource binders.

### Discussion (10 minutes)

10. In a large group discuss participants' preferences for applicants bringing their references' names and contact information to the interview, or requesting the references after they have made a decision about the candidate's suitability for the position. Suggest that they should always ask for three references, including one reference that is work-related.
11. Then using a flip chart page to record their answers, ask participants to identify the pros and cons of having candidates bring their references to the interview. Do the same for asking for the references after the consumer has made a decision about the candidate.



12. Ask participants if they have any additional questions about soliciting references.

### –Teaching Notes–

*–Teaching Notes–*

## Activity 5.3 Making an Offer

30 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Explain why it is important to follow up with all candidates who interviewed for the job;*

*Explain that when making a hire, it is best to list potential candidates in order of preference and call them in that order;*

*Politely turn candidates down who don't meet their needs; and*

*Identify ways to use suitable candidates for back-up or emergency support or assistance.*

### Key Content

- After interviewing all candidates, the next step is making an offer to one or more of the candidates.
- When preparing to make an offer, the first step is to place candidates in order of preference. Offer the position to the person at the top of the list first, wait for their response, and then continue down the list until someone agrees to take the position.
- If there are multiple good candidates, after filling regular shifts, determine if any of the other good candidates might be available for back-up shifts or future positions.
- Follow-up, either by phone or mail, with all candidates who were considered for the position.
- Don't reject candidates until an offer has been accepted and a work agreement signed.

### Activity Steps

#### Interactive Presentation (10 minutes)

1. Explain that after completing the process of interviewing candidates, the next step is to make an offer. Reinforce that it is best to list candidates in the order of preference and call the person on the top of the list first. Ask:

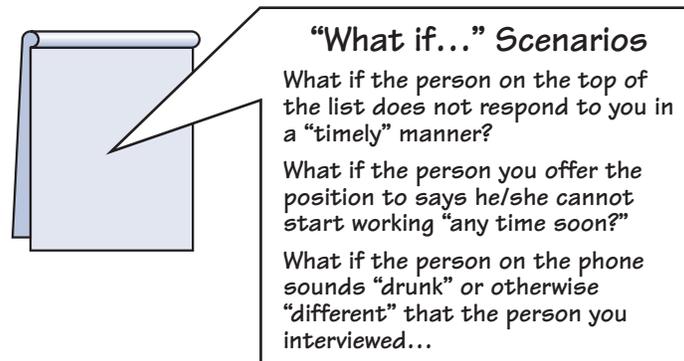
*How would you decide the order of preference? What factors would you consider?*

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## Module 5: Hiring Personal Assistants

Activity 5.3, continued

2. On a flip chart page, write the following “what if...” scenarios, and facilitate a discussion about each.



### ► Teaching Tips

In the first scenario, have participants define their idea of “timely” in this situation.

In the second scenario, have participants define what ‘any time soon’ means to them.

To follow up, ask:

*How long would you wait to hire an ideal candidate? Would you hire someone to just cover for that period of time?*

3. Explain that it is important to follow up with all candidates who were considered for the position, even those who were not “the best.” Ask participants why they should follow-up.

Responses to look for might reflect the following: Some of these candidates might be willing to provide back-up support or take future positions.

4. Note that consumers should meet with the candidate who accepted the offer and review and sign a work agreement (Activity 5.4) prior to notifying other candidates that they did not get the job.

### Pairs work (10 minutes)

5. Explain that rejecting candidates can be difficult. Ask participants to take a moment to imagine themselves being turned down for something that was important to them.

Ask participants:

*How would you react to being rejected? What feelings might come up? What would make this less painful?*

6. Ask everyone to turn to the person next to them and to talk in pairs for a moment about whether they would choose to reject candidates by letter or telephone. Bring the group back together and ask:

*What are the advantages and disadvantages of each method?*

Emphasize that it is important to personally contact anyone who might make a good back-up person or future PA.

### ► Teaching Tip

As time allows, you may want to have instructors role play a tense rejection conversation, followed by discussion of its impact on the consumer and candidate, and then a positive rejection conversation, again followed by discussion of its impact.

7. Explain that, because it is difficult to personally call someone and reject them for a position, the group is going to practice. Ask the participants to quickly form pairs and have each one take a turn giving the other person “the news.”

### Discussion (10 minutes)

8. In a large group, ask the “candidates” what they thought and felt about the consumer’s handling of the situation, and the “consumers,” how it felt in the moment. Ask:

*How did consumers explain why the candidate wasn’t getting the job?*

*Did the consumers ask the candidate about their availability for back-up or future positions?*

*Did this make it easier to say “no?”*

9. Distribute Handout 35, “Tips on Making an Offer,” for participants’ resource binders.

10. Wrap up by emphasizing that contacting people personally allows consumers to keep expanding the pool of potential PAs. Next time they are looking, they may want to send a mailing, or call, candidates who applied this time.

–Teaching Notes–

*–Teaching Notes–*

## Activity 5.4 Sealing the Deal: Developing Work Agreements

60 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Explain what belongs in a work agreement;*

*Communicate to a candidate or newly hired PA their job responsibilities and the consumer's expectations of the relationship; and*

*Draft a work agreement for a current or future PA position.*

### Key Content

- A work agreement (or job description) is a good way for consumers to communicate their needs and preferences to PA candidates who are in the final stages of considering/accepting a job offer.
- Many consumers find that developing a work agreement is helpful in both hiring and working with PAs. Studies have also shown that workers often prefer to have a written description of their work duties. In addition to clarifying expectations in the final stages of hiring, the work agreement can also help to minimize disagreements later on.
- Specifically, a work agreement can be used:
  - To help the consumer get a realistic picture of his or her assistance needs, limitations, and lifestyle.
  - To give a prospective employee a clear idea of what the position requires.
  - As a checklist of duties and responsibilities of the position.
  - As an evaluation tool of the PA's performance on the job.
  - To remind the consumer-employer about the original agreement, so that he or she doesn't take advantage of the PA.
  - To clarify disputes between the consumer and the worker as to what the worker's duties are.
  - To help keep communication open in the consumer/PA relationship.
  - To establish the position as a "real" job, with standards and recognition, and not just someone "helping out."

**Note:** The above list has been adapted from a list developed by the Community Living Alliance, Madison, Wisconsin.

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Activity 5.4, continued

### Activity Steps

#### Discussion (15 minutes)

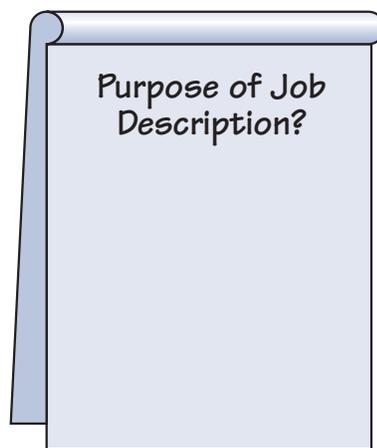
**1.** Ask participants:

*Has anyone ever seen a job description for any job they've ever held?*

If someone says “yes,” then ask:

*What do you think was the purpose of having a job description for the employer? For you, as the employee?*

Use a flip chart to record responses.



**2.** Explain that a job description is much like a work agreement, which is the focus of this activity. Ask:

*How can it be used?*

In the discussion, make sure to touch on the points listed in the Key Content at the beginning of this activity.

**3.** Distribute copies of Handout 36, “Consumer/Personal Assistant Work Agreement.” Review the main categories covered by the work agreement—e.g., work hours, tasks, wages, and expectations for relationship.

**4.** Distribute copies of Handout 37, “Actions That Help Avoid Unnecessary Coverage Emergencies.” Suggest that now is a good time to check through the list and think what, if anything, they’d want to add to the work agreement based on it. Also, refer everyone to the more extensive agreement in the *Hiring and Managing Personal Assistants* guide (on the CD).

### Individual work (30 minutes)

5. Ask participants to develop a work agreement for their primary PA position using Handout 36. The agreement will be based on their “Snapshot of Me” (Handout 16) and their “Staffing Plan and Personal Assistant Schedule” (Handout 23). Remind them to refer to their PA Schedule and see if they think different work agreements will be necessary for different positions.

► **Teaching Tip**

This activity can be done in pairs, with partners coaching each other, spending 15 minutes on each person’s work agreement. Another option would be to form small working groups and assign one facilitator to help each group.

### Discussion (15 minutes)

6. Bring participants back together, and ask:

*What was most important for you to have in your work agreement?*

*Did you find the process of developing the agreement helpful? In what way?*

*How do you think you will use your work agreement?*

—Teaching Notes—

*–Teaching Notes–*

# Activity 5.5 Overview of Consumer-Directed Program Requirements

30 minutes

## Learning Outcomes

By the end of this activity, participants will be able to:

*Explain basic program requirements, including:*

- *Application procedures*
- *Determination of “approved hours”*
- *Hour requirements and restrictions for PAs*
- *Wages and benefits*
- *Process for terminating employment*

## Key Content

- Consumers need to be clear that they are responsible for knowing information about program and administrative requirements, for communicating it to their prospective and current workers, as necessary, and for meeting reporting requirements.
- This is not an in-depth session where all the consumer’s questions are answered. It is designed to provide a summary review of what is required as an employer. As consumers move closer to hiring, they will receive more detailed orientation.

## Activity Steps

### Interactive Presentation

#### ► Teaching Tip

You may want to invite a guest speaker from the administering agency of the consumers participating in the session to present this section.

1. Hand out and provide a brief overview of the following program requirements and administrative forms. As you proceed, give participants a chance to ask questions.

- Program application forms
- Overview of Medicaid information
- Any specific mandates regarding what personal assistants (PAs) are allowed or not allowed to do with regard to providing care
- Wages and any benefits to be paid to PAs (including health insurance and sick, vacation and holiday pay, if any)
- Requirements or restrictions on the number of hours PAs are allowed to work (i.e., not more than 40 hours per week, etc.)

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## Module 5: Hiring Personal Assistants

Activity 5.5, continued

- Application requirements for hiring (i.e., specific forms, Social Security numbers, citizenship verification, criminal background checks, physicals, etc.)
  - Payroll administration (how timesheets are to be filled out, when they must be submitted, who gets checks, when, etc.)
  - Information about whether there are any oversight requirements (For example, some states require that an RN visit twice per year to assess whether the consumer's needs are being met satisfactorily.)
  - Who to contact regarding payroll problems, problems signing up new PAs, etc.
  - Any requirements or monetary allowances (or resources) for training of PAs.
  - The process for terminating employment of PAs.
  - Any other relevant information required for implementation of the program.
2. Remind participants that when they are formally accepted into the consumer-directed program, they will likely be required to meet for a one-on-one session with a case worker or counselor to review all of this information.

*–Teaching Notes–*

## Activity 5.6 Closing

15 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Identify at least one thing they learned in this session that they will use when they begin interviewing and hiring.*

### Key Content

- Providing closure to the day is an essential part of training. This time allows the trainer to wrap up the day's discussions, answer additional questions, and convey the next steps to the group. In addition, the end of day wrap up allows participants to share what they learned—subsequently providing an informal evaluation for the trainer to know what parts of the training was most useful.

### Activity Steps

#### Discussion

1. Explain that this is the end of the session (or the "Finding and Hiring" workshop), which is a time to reflect on what participants learned and how that learning can be applied to their personal situations. Ask participants:

*What is the most important thing you learned in this workshop?*

*How do you think you can apply what you learned to your own situation?*

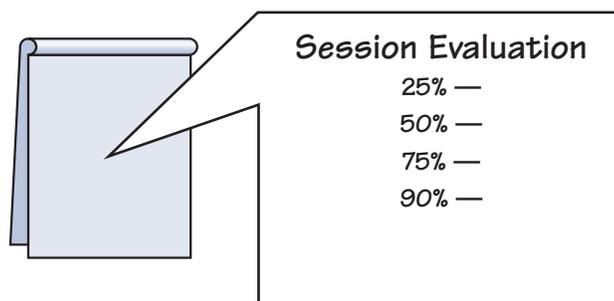
*What kind of follow-up activities would help you to reinforce what was covered during this workshop?*

2. Explain that the next workshop (or two sessions) will focus on how to effectively and constructively supervise personal assistants so that they can enjoy long and positive relationships with the people they hire.

3. Conduct a quick evaluation by asking participants:

*How much of today was a good use of your time?*

Invite them to vote for the percentages you have listed on a flip chart.

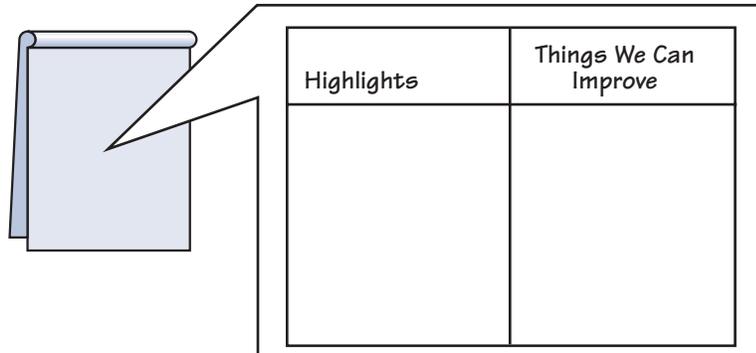


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## Module 5: Hiring Personal Assistants

Activity 5.6, continued

4. After they've voted and you've recorded the responses (praising those who give lower ranking for their honesty), ask them to tell you what worked really well for them—the highlights, and what they think could be better—the 'low-lights.' Record ALL answers on the flip chart.



The image shows a flip chart with a table. To the left of the table is a drawing of a flip chart with a blue cover and a white page. A line connects the flip chart to the table. The table has two columns and two rows. The top-left cell is labeled 'Highlights', the top-right cell is labeled 'Things We Can Improve', and the bottom two cells are empty.

Highlights	Things We Can Improve

Thank participants who give you critical feedback and emphasize that it will help you make future sessions better for participants.

A fun way to draw the session to a close is to call for a motion to adjourn, and invite all who agree that it's time to adjourn to say, "Aye!!"

5. Give participants the details, including the time and date, of the next session, if appropriate.
6. Say good-bye and wish participants well in their efforts to apply the skills and understandings they've gained at the session.
7. Celebrate, as appropriate.

### —Teaching Notes—

# **EMPLOYING, SUPPORTING, AND RETAINING YOUR PERSONAL ASSISTANT**

A Workshop Series for  
People with Disabilities

## **Handouts**

**Workshop II: Module 5  
Hiring Personal Assistants**



# Sample Reference Questionnaire

*"Hello, my name is \_\_\_\_\_, and I'm calling because \_\_\_\_\_ (PA Candidate) has given me your name as a reference. Can I ask you a few questions?"*

1. **Can you please describe how you know this person, and what you know of him or her?** Just give the person a chance to talk. These questions will draw them out and help you get a full picture...
  - a. How long have you know this person? ...or How long did you know him/her in your shared experience?
  - b. What experiences did you share?
  - c. Did you have to rely on him/her to follow through with commitments and responsibilities?
    - Was s/he reliable and dependable?
    - Was the quality of what s/he did very good?
    - Was s/he a pleasure to work with as you accomplished your shared work or activities?
  - d. What do you consider her/his strengths as a worker or friend or community member?
  - e. [If the reference is a former employer] Would you re-hire her/him? Please explain why or why not
2. I am considering him/her for a position with me as a Personal Assistant. This means that s/he will be [list responsibilities and what you're looking for]. **Do you think s/he has the skills and qualities I'll need in this position? Can you please describe why?**
3. **How would you describe his/her communication and relationship skills and qualities?**
4. **Ask questions related to your individual preferences and needs!!**
5. **Is there anything I haven't asked that you would like to share with me?**

# Tips on Making an Offer

## *Timing and Process Are Both Important*

- ◆ Return calls to ALL candidates who applied
- ◆ Make calls to offer the position in order of preference for hire
- ◆ Don't reject other candidates until after signing a hiring agreement with your candidate of choice
- ◆ If there are more good candidates than positions, ask candidates who won't be hired if they'd be available for emergencies, back-up, or a future opening

# Consumer/Personal Assistant Work Agreement *Option 1*

This work agreement is between \_\_\_\_\_ (personal assistant) and \_\_\_\_\_  
\_\_\_\_\_ (employer):

I, \_\_\_\_\_, agree to work the following days and hours:

Days:	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
From:							
To:							
From:							
To:							

**We** agree that I \_\_\_\_\_ will be responsible for completing the  
general tasks listed below in the way that \_\_\_\_\_  
(employer's name) prefers, during the agreed upon days and hours:

_____	_____
_____	_____
_____	_____
_____	_____

**We agree** that changes to what is listed above can be made verbally and will be followed up by written documentation for both parties (employer and personal assistant) records.

**Work Agreement, page 2:**

I, \_\_\_\_\_(Personal Assistant), Agree (Initial below appropriate agreements)

\_\_\_\_\_ When I leave during work hours, I will give the approximate time of return, **and** when possible, will leave a phone number where I can be reached.

\_\_\_\_\_ When I will be late to work, I will call the employer as soon as I know.

\_\_\_\_\_ If I need to call out for an unplanned absence, I will do so in a way that allows my employer the most time to find a replacement, **preferably the evening before the shift begins.**

\_\_\_\_\_ I will pay for any non-local calls that I may make from my employer's telephone.

\_\_\_\_\_ I will earn '\_\_\_\_' days or '\_\_\_\_' hours off per \_\_\_\_\_ days or hours worked.

\_\_\_\_\_ When I need time off, I will give at least '\_\_\_\_\_' days or weeks notice.

**Other Agreements:**(based on Employer Preference or tasks not included in attached Personal Assistance Planning List):

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WE MUTUALLY AGREE TO TREAT EACH OTHER WITH MUTUAL RESPECT AND SUPPORT **AND** WE WILL TRY TO BE FLEXIBLE AND WORK AT SOLVING PROBLEMS AS THEY ARISE.

TWO WEEKS NOTICE WILL BE GIVEN BY EITHER PARTY REGARDING TERMINATION OF THIS AGREEMENT.

\_\_\_\_\_  
PERSONAL ASSISTANT NAME/ DATE

\_\_\_\_\_  
EMPLOYER NAME / DATE

# Actions That Help Avoid Unnecessary Coverage Emergencies

## **Monthly Calendars:**

Prepare and review the calendar together before each month begins to identify special coverage issues (e.g., dental appointments, events, holidays).

## **Special Occasion or Event:**

Inform your assistant of any that will happen in the near future.

## **Vacations:**

Ask assistants to plan in advance and notify you as soon as they know the details.

## **Problem Getting To Work:**

Ask PAs to contact you as soon as possible.

## **Illness:**

Talk with your assistant if he or she feels ill. Discuss the possibility of him or her not working the next day rather than calling in at the last minute.

## **Back-up and Emergency Assistants:**

Have several!

## **Build a Support Network:**

Talk with friends and family about helping out "in a pinch," either to fill in for a PA or to bring you something vital.

# Workshop III: Supervising Personal Assistants

**Module 6: Introduction to Basic Supervisory Skills: Active Listening**

**Module 7: Supervisory Skills II**



Funding for the development of this curriculum was provided  
by Centers for Medicare and Medicaid Services (CMS)

Distributed by Direct Service Workers—AR Hands That Care

## Module 6

# Introduction to Basic Supervisory Skills: Active Listening

### Goal

- To introduce consumers to the role of supervision in the consumer-directed model, and to help consumers begin developing active listening skills that are essential to effective supervision.

### Time

3.5 hours, plus break

Activities	Teaching Methods	Time
6.1 Welcome & Homework Review	Discussion	15 minutes
6.2 Great, Not so Great	Discussion, small-group work	30 minutes
6.3 Responsibilities of Supervisors	Discussion	15 minutes
6.4 Introduction to the Coaching Approach to Supervision	Large-group exercise, discussion	30 minutes
6.5 Active Listening: Nonverbal Listening	Interactive presentation, role play, discussion	30 minutes
6.6 Active Listening: Effective Verbal Communication	Large-group exercise	15 minutes
6.7 Active Listening: Paraphrase and Asking Open-Ended Questions	Interactive presentation, pairs work, discussion	60 minutes
6.8 Closing	Discussion	15 minutes

### Supplies

- Flip chart, easel, markers, tape
- Paper and pens or pencils
- Gifts for the bingo game (Activity 6.7). These may be candy, pens, pencils, or pads of paper. See what your local agency has available. You may choose to buy a bag of wrapped candies.
- Jar of peanut butter, jar of jelly, loaf of bread, knife, napkins, and plate.

**Note:** An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use overheads, make sure you have the necessary equipment and screen. (Some PowerPoint slides are provided on your CD. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.

### Handouts

- Handout 39: “Workshop III: Goals and Objectives”
- Handout 40: “Supervision—Handout for Note-Taking”
- Handout 41: “Supervisory Functions”
- Handout 42: “Coaching Supervision Role Play Scenario”
- Handout 43: “Traditional Supervision Role Play Scenario”
- Handout 44: “Comparison of Traditional and Coaching Supervision”
- Handout 45: “Four Primary Skills of Coaching”
- Handout 46: “Three Skills of Active Listening”
- Handout 47: “Paraphrasing”
- Handout 48: “Lead-Ins for Paraphrasing”
- Handout 49: “Closed and Open-Ended Questions”
- Handout 50: “Paraphrase and Open Questions Bingo”

### Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants’ physical needs.

Review the teaching materials for each activity.

If using projection equipment, set it up for optimum viewing by all participants.

If participants did not attend previous workshops, have 3-ring binders to distribute. As participants add handouts, they will build a resource guide.

### Activity 6.1 An Introduction to Supervising Personal Assistants

Prepare flip chart pages with the “Workshop III: Goals and Objectives,” and the day’s agenda, including breaks, to review with participants.

Copy Handout 39, Workshop III: Goals and Objectives,” for all participants. If distributing binders, you may want to put this handout in the binders.

### **Activity 6.2 Great, Not so Great**

Participants will need a comfortable hard surface to work. Arrange for appropriate tables to be in the room.

Have flip chart pages or colored construction paper/card pages and markers ready for the work groups.

Copy Handout 40, “Supervision—Handout for Note-Taking,” for all participants.

### **Activity 6.3 Responsibilities of Supervisors**

Copy Handout 41, “Supervisory Functions,” for all participants.

### **Activity 6.4 Introduction to the Coaching Approach to Supervision**

Copy Handout 42, “Coaching Supervision Role Play Scenario,” for all participants. If you plan to do the Traditional Supervision role play as well, copy Handout 43 “Traditional Supervision Role Play Scenario.”

Copy Handout 44, “Comparison of Traditional and Coaching Supervision,” for all participants.

Copy Handout 45, “Four Primary Skills of Coaching,” for all participants.

### **Activity 6.5 Active Listening: Nonverbal Communication**

Copy Handout 46, “Three Skills of Active Listening,” for all participants.

### **Activity 6.6 Active Listening: Effective Verbal Communication**

Set out jar of peanut butter, a jar of jelly, a loaf of bread, a knife, napkins, and a plate on table where you can do the demonstration for this exercise.

### **Activity 6.7 Active Listening: Paraphrase and Asking Open-Ended Clarifying Questions**

Prepare a flip chart page with the definition of “Paraphrase,” as shown in step 1.

Copy Handout 47, “Paraphrasing,” for all participants.

Copy Handout 48, “Lead-Ins for Paraphrasing,” for all participants.

Copy Handout 49, “Closed and Open-Ended Questions,” for all participants.

Copy Handout 50, “Paraphrasing and Open-Ended Questions Bingo,” for all participants.

### **Activity 6.8 Closing**

Prepare a flip chart page to record evaluation scores as shown in step 3.

*–Teaching Notes–*

# Activity 6.1 Welcome & Homework Review

15 minutes

## Learning Outcome

By the end of this activity, participants will be able to:

*Describe the workshop goal and objectives and the day's agenda.*

## Key Content

- The focus of today's activities is reviewing the responsibilities of supervisors, considering what makes a supervisor "great," and then beginning to strengthen the skills needed to be an effective and constructive supervisor.
- The coaching approach to supervision offers skills and approaches that strengthen consumers' relationships with their PAs and, therefore, enhance consumers' ability to have their needs met and their preferences honored.
- Active listening skills (reviewed in the recruitment and hiring modules) are foundational for good relationships and keeping great PAs.

## Activity Steps

### Discussion

1. Welcome everyone back to the workshop, if this is one of a series. Ask if participants have any questions or reports on recruiting, screening and hiring their PAs, and hold a brief discussion as appropriate.

#### ► Teaching Tip

If this workshop is not part of a series, welcome participants and use an icebreaker that will allow everyone to introduce themselves and begin building relationships with one another. Explain that the workshop will be highly interactive, and everyone will have a chance to participate by sharing their thoughts, feelings, and experiences. Then skip to Activity 6.2. Trainers should also introduce themselves and include a brief description of their background.

If this workshop is part of the series, and participants already know one another, consider an ice-breaker to energize participants and prepare them for the day.

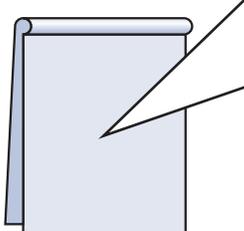
2. Distribute Handout 39, "Workshop Goals and Objectives" for participants' binders. (If participants have not attended a previous workshop, distribute the handout with a binder that will hold all of their handouts from the workshop.)

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## Module 6: Basic Supervisory Skills

Activity 6.1, continued

3. Post the flip chart page, “Workshop Goals and Objectives.” Review the bullet points and encourage questions.



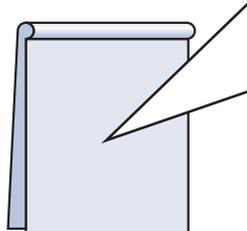
**Workshop Goals:**

- To introduce participants to the purpose of supervision and the skills needed to use a coaching approach.
- To help participants understand the role of supervision in getting their needs and preferences met.

**Objectives:** After completing this workshop, participants will be able to:

- Describe the purpose, roles and responsibilities of supervision.
- Identify the qualities of a great supervisor.
- Understand what skills are required to be a coach-supervisor, including active listening, self-awareness, self-management, and giving constructive feedback.

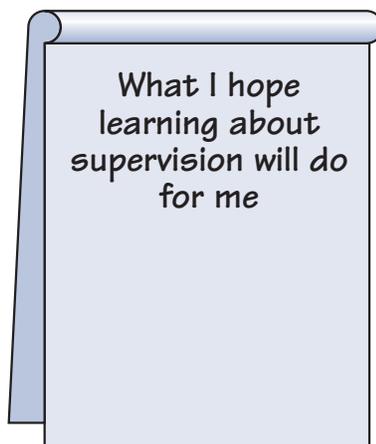
4. Post the flip chart: Agenda for the day’s activities. Review the times, including breaks. Make sure everyone is comfortable with the layout and temperature of the room.



**Agenda**

Welcome & Homework Review	9:00–9:15
Great, Not so Great	9:15–9:45
Responsibilities of Supervisors	9:45–10:00
Break	10:00–10:15
Introduction to the Coaching Approach to Supervision	10:15–10:45
Nonverbal Listening	10:45–11:15
Effective Verbal Communication	11:15–11:30
Paraphrase and Asking Open-Ended Clarifying Questions	11:30–12:30
Closing	12:30–12:45

5. Write “What I hope learning about supervision will do for me” on the flip chart. As an introductory activity have each participant share: their name and supervisory experience, and one hope or expectation they have for this workshop. Record each “hope” on the flip chart as it’s shared. Keep this flip chart as a check-in reference for the closing activity (Activity 6.8.)



What I hope learning about supervision will do for me

6. After everyone has introduced themselves, introduce yourself and share your hopes and expectations for the workshop (e.g., “I hope you have fun!”).
7. Wrap up by thanking everyone for openly sharing their hopes. Note that the rest of this session will focus on helping them achieve what they hope for.

► **Teaching Tips**

It’s important that trainers who don’t yet know the participants make an effort to learn everyone’s name as soon as possible. Write them down if necessary.

Keep your own introduction brief and focused.

Listen carefully to each participant. Remember, you are modeling good coaching practices

*—Teaching Notes—*

*–Teaching Notes–*

## Activity 6.2 Great, Not So Great

30 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Describe the characteristics of great and not so great supervision.*

### Key Content

- The goal for consumers in supervising their personal assistants is to manage this task in such a way as to have as many “ideal” days as possible. Considering what makes a supervisor effective is the first step to becoming an effective supervisor oneself. Effective supervisors foster strong relationships with their personal assistants and, thereby, encourage good performance.
- In considering the characteristics of “great” supervisors, consumers will be able to identify their own strengths and areas that will need improvement.

### Activity Steps

#### Discussion (5 minutes)

1. Introduce this activity by reminding participants of the earlier activities in which they described their “Ideal PA” (Workshop I, Module 1, Activity 1.2) and “Ideal Day” (Workshop I, Module 2, Activity 2.2). This activity is meant to stir one’s thinking about what makes a really great supervisor. And what makes a supervisor not so great.

► **Teaching Tip**

If participants were not part of Workshop I, begin with step 2.

2. Explain that in this activity, we are going to create the “ideal” or “perfect” supervisor. Ask:

*How would you describe a GREAT supervisor?*

*How would you describe a NOT so GREAT supervisor?*

#### Small Group Work (10 minutes)

3. Distribute a piece of poster board or flip chart paper and markers to each table. Depending on the size of your group, you may want to break the class into two small groups to work together.

► **Teaching Tip**

Consider bringing paper in two colors so that the “Great” and “Not So Great” groups have different colors.

4. Ask each table or group to draw a figure representing a generic supervisor (e.g., a stick figure).

5. Assign *one* of the two questions (“Great” and “Not so Great”) to each table or group. Half of the tables or groups get “great”; the other tables or groups get “not so great.”

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## Module 6: Basic Supervisory Skills

Activity 6.2, continued

6. Encourage participants to work from their own experiences (either supervising or being supervised). If participants don't have direct experience with supervision, ask them to think about bosses or managers from TV and movies. Another possible source of "inspiration" may be for participants to imagine a case manager who has been involved in their care. Encourage them to use their imagination.
7. Ask the groups to draw and describe—using words and images—the "great" or "not so great" supervisors on their pieces of poster board or paper.

► **Teaching Tip**

The instructor(s) should circulate, working with each table or group, to ensure everyone is participating.

After 5-7 minutes, stop the groups.

### Discussion (15 minutes)

8. Distribute Handout 40, "Supervision—Handout for Notetaking." Explain that the next few activities are intended to help them think about what supervision means. Tell participants that there are many different responsibilities associated with supervision, and reasons why we supervise. Tell participants that they will be using Handout 40 for writing notes about what they hear or see concerning how they want to supervise, as well as areas they want to improve.
9. Ask each table or group to present their "supervisors," and post them around the room.
10. When all "supervisors" are presented and posted, make connections between the "great" and "not so great" presentations.
11. Ask the group:
  - What were some of the differences in opinion when answering the questions?*
  - What were the commonalities, what came to your heads' automatically?*
12. Point out that for the most part, participants thought about their "ideal supervisor" in a way that highlights the supervisor's character and personality. Tell participants that in the next activity, they will begin exploring supervisory skills, responsibilities, and abilities.

### —Teaching Notes—

## Activity 6.3 Responsibilities of Supervisors

15 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Describe the purpose and responsibilities of supervision.*

### Key Content

- Just as it is important to understand the qualities of an effective or “great” supervisor, it is necessary to know the responsibilities that a supervisor has to fulfill in order to handle all of the issues that arise. In this module, participants will consider the many aspects of a supervisor’s role.

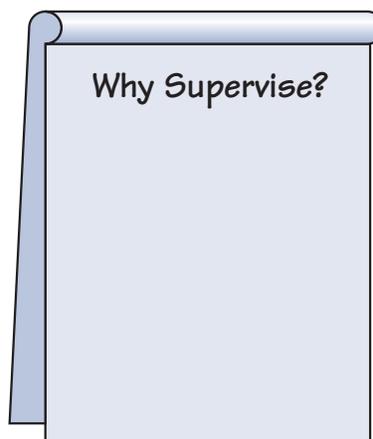
### Activity Steps

#### Discussion

1. Distribute Handout 41, “Supervisory Functions.” Explain that the previous activity was about the “how” of supervision; now they will move on to “what” a supervisor actually does.
2. Have participants review the list of responsibilities, and ask the group if they would add anything to this.
3. Have people look at the ‘ideal supervisor’ and the supervisory functions listed on Handout 41 and then pose the question:

*So, given what we’ve just talked about, how would you describe the purpose of supervision?  
Why do we need to supervise?*

4. Write “Why Supervise?” on a flip chart and record participant responses. These will serve as the basis for a working definition of supervision.



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## Module 6: Basic Supervisory Skills

Activity 6.3, continued

### ► Teaching Tip

A common purpose or definition of supervision is: to interact with our employee in a way that gets us closer to our ideal/perfect day by having tasks and services delivered in a way we prefer.

5. Remind participants that they can use their “Supervision” handout to take notes about any discussion points they want to remember.

6. Close this activity by checking in with participants. Ask:

*Are you clear about the role, responsibilities, and purpose of supervision?*

7. Wrap up any final questions or concerns.

–Teaching Notes–

## Activity 6.4 Introduction to the Coaching Approach to Supervision

30 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe skills used in the coaching approach to supervision;*

*Explain how using a coaching approach effectively leads to positive outcomes and better relationships between consumer supervisors and workers—who may or may not be family or friends; and*

*Compare or contrast their experiences with supervision with that in the role-play scenario.*

### Key Content

- Coaching supervision, as shown in the coaching role play, generally leads to positive outcomes for both workers and consumers. When results are positive, workers stay on the job longer and consumers are more likely to have their needs met. Good supervision creates healthy working relationships, and increased levels of comfort for consumers. In addition, when relationships between workers and consumer-supervisors are positive, consumers experience fewer disruptions in the delivery of care and services.

### Activity Steps

#### Large-group exercise (20 minutes)

1. Distribute Handout 42, “Coaching Supervision Role Play Scenario.” Have participants (or instructors if you think that will be more effective) act out the parts of the supervising-consumer (Laura) and the Personal Assistant (Isabel). Explain that everyone can follow along by reading or listening.

#### ► Teaching Option

If you have extra time, and the group will benefit from the contrast, perform the “Traditional Approach” role play first and debrief with participants. Then present the “Coaching Supervision” role play and allow the group to discuss how they contrast.

2. Debrief the role play using the following questions:

*What was happening in this scenario? For Isabel and for Laura?*

*How does this role play scenario relate to their experiences as supervisors (or as supervisees) OR to their beliefs about supervision?*

*How does this scenario relate to what you’ve seen happen or imagine can happen in these situations? Refer participants back to the earlier conversations about Great/Not So Great Supervisors.*

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## Module 6: Basic Supervisory Skills

Activity 6.4, continued

*How might another supervisor have handled this?*

*What did you like about Laura's approach with Isabel? What did you dislike or what didn't feel real to you?*

*What do you think will be the likely outcome of this interaction in terms of their working relationship?*

**3.** Point out that this scenario demonstrates a method of supervision that differs from what most people think of as supervision. Traditionally, people use a correctional or disciplinarian approach to supervising workers. (Relate this to experiences participants may have talked about earlier.)

### **Interactive presentation (10 minutes)**

**4.** Distribute Handout 44, "Comparison of Traditional vs. Coaching Supervision." Explore the differences between the two. Explain that using a coaching approach is more likely to lead to positive outcomes and better relationships between consumer supervisors and personal assistants, whether or not they are family or friends.

**5.** Explain that the rest of the seminar will focus on developing basic coaching supervision skills. Distribute Handout 45, "Four Primary Skills of Coaching." Explain that in this workshop, which is really only an introduction to supervision, we will be covering Active Listening, Self Awareness and Self Management, and Feedback.

*—Teaching Notes—*

## Activity 6.5 Active Listening: Nonverbal Communication

30 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

- Explain the importance of listening as an essential skill in supervision; and*
- Experience the difference between active listening and poor listening and describe the impact of each in any interaction.*

### Key Content

- This part of the workshop introduces the primary tool for coaching supervision: active listening. Active listening is critical for clear, effective communication.
- Good listening is crucial to any relationship and to effective communication. Although participants may feel that they are already good listeners, supervision requires a more conscious level of listening, called *active listening*.
- Active listening is *staying engaged in the other person's story by using the skills of nonverbal communication, paraphrasing and open-ended questions*.
- Most of us rarely use active listening skills, because we are not in the habit of doing so.
- *Active listening is an essential skill in a coaching supervision because:*
  - Being listened to attentively feels caring and helpful to the speaker. Being listened to in an inattentive manner or being ignored, feels dismissive, hurtful and unhelpful.
  - When confronting a problem, many people, especially supervisors, tend to search immediately for a solution to address the problem situation, without confirming the accuracy of the information they are given or gathering sufficient information. When we listen with our full attention, we remember and understand more of what is being communicated. On the other hand, when we listen inattentively, we miss a great deal of what is being communicated.
- “Non-verbal communication” refers to the way people communicate without actually speaking—it includes facial expressions, eye contact or gestures. Many times we may unknowingly communicate a different message than we consciously intend through non-verbal behaviors, and this can lead to unintended impacts and negative consequences.

### Activity Steps

#### Interactive Presentation (5 minutes)

1. Explain that this part of the workshop introduces the primary tool used in coaching—listening. Ask participants to share what they think “active listening” means. Distribute Handout 46, “Three Skills of Active Listening” and review. (For participants who attended Workshop II, refer to the discussion of Active Listening that was part of Module 4).

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## Module 6: Basic Supervisory Skills

Activity 6.5, continued

2. Briefly explain the importance of nonverbal communication in active listening (see Key Content).

► **Teaching Tip**

Be aware of the physical abilities of the participants when discussing nonverbal communication (a.k.a. body language). Some participants may have difficulty controlling their bodies, so their body language may come through most clearly in facial expressions. Look for, encourage discussion about, and identify ways participants can demonstrate non-verbal communication through body language, regardless of their disabilities.

### Demonstration Role Play (5 minutes)

3. Explain that you and your co-instructor are going to engage in a set of role plays that will demonstrate “non-listening” and “listening,” primarily through nonverbal communication. Explain that one instructor will be telling a personal story to the other instructor, while that instructor will do everything within her capacity to show she is not listening.

#### Role Play

To demonstrate nonverbal poor listening, Instructor 1 tells Instructor 2 about something that is going on in his or her life—something very important and preferably current. It can be something positive or something the person is struggling with. Instructor 2, while supposedly listening, exaggerates nonverbal poor listening skills by becoming increasingly distracted. For example, she or he could keep looking at the clock/a watch, whistling, writing, glancing away, getting fidgety, etc.

4. Before beginning the role play, ask for a timekeeper and ask him or her to let you know when 90 seconds has passed. Conduct the role play.

► **Teaching Tips**

If there are people in wheelchairs in the room, you may choose to role play from a sitting position to make the situation more applicable.

If two instructors are not available, choose a participant to help out who you believe will feel comfortable enough with the activity and prepare him or her during a break. It is usually best to have the participant tell the story while the instructor demonstrates active listening using nonverbal body language and not listening.

### Discussion (10 minutes)

5. After the nonlistening demonstration, ask participants:

*How could you tell that Instructor 2 was not listening? What did she do?*

Ask the storyteller:

*How did it feel not be listened to?*

Flip chart these responses, under “Impact of Poor Listening” heading on the flip chart page.

Ask the “non-listener”:

*What do you remember about what the speaker told you?*

Emphasize here how little information Instructor 2 was taking in.

Write participants’ first responses on flip chart page labeled Poor Listening. Then add “Impact of Poor Listening.”



► **Teaching Tip**

Remember that the focus is not simply on how good it feels to be listened to, but also on the importance of listening in order to clearly understand the information being shared.

### **Demonstration Role Play (2 minutes)**

6. Repeat the same role play (with the same topic), only this time Instructor 2 should demonstrate good nonverbal communication skills. Again, ask for a participant to keep time for 90 seconds while you role play.

### **Discussion (8 minutes)**

7. After the listening demonstration, ask Instructor 1:

*How did it feel to be listened to?*

Ask Instructor 2:

*Can you retell the speaker’s story?*

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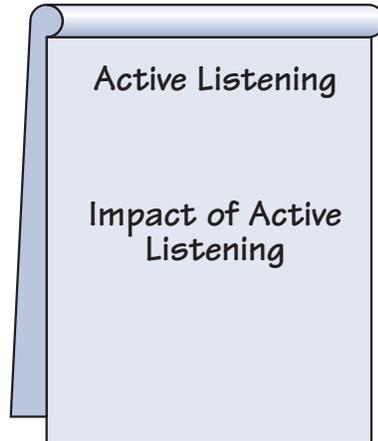
## Module 6: Basic Supervisory Skills

Activity 6.5, continued

Ask participants:

*How could you tell that Instructor 2 was listening?*

Write participants' responses on flipchart, labeled Active Listening.



**8.** Emphasize that nonverbal communication is an essential part of active listening and requires self-awareness and lots of practice. In coaching, listening is essential because it allows you to hear the whole story, which makes you more able to effectively problem solve later. Encourage participants to strengthen their skills by trying to be effective listeners all the time.

*–Teaching Notes–*

## Activity 6.6 Active Listening: Effective Verbal Communication

15 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the challenges involved in strictly verbal communication;*

*Explain the importance of clear and complete verbal communication to positive relationships;*

*Describe the difficulties that assumptions make in communication;*

*Explain the importance of asking questions when information is not clear; and*

*Explain how miscommunication can lead to mistakes in performance.*

### Key Content

- Communication is very important in supervision. Focused, precise listening and speaking are essential. However, few people receive instruction in the verbal communication skills required for effective communication.
- Explaining things in clear, simple language is an essential communication skill. Also important is the ability to ask questions to confirm or clarify what a speaker has said. When supervisors don't check in with their PAs, it may turn out that the PA and supervisor were interpreting what was said very differently.
- We often fail to communicate fully and clearly because of all the assumptions we make about what the other person knows – or what we think she or he should know. These assumptions and the ways we short-cut communication can create problems in our relationships and in performance.

### Activity Steps

#### Large-group exercise

1. Explain that verbal communication is a necessary skill for supervising. However, few of us receive instruction in the skills required for effective verbal communication. In this activity, participants will explore challenges to communication by telling the instructor how to make a peanut butter and jelly sandwich.

#### ► Teaching Tip

You can have a bit of fun with this by asking participants to imagine that you have never made a sandwich of this nature and are really looking forward to trying one, since everyone has told you they are quite yummy and easy to make. Inform the class you are not going to give up—no matter what happens!

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## Module 6: Basic Supervisory Skills

Activity 6.6, continued

2. Ask participants to give only one instruction at a time. Explain that you will not be able to ask any questions and will do exactly what they say.

### ► Teaching Tips

Follow the directions exactly and literally. Don't clarify, paraphrase, or ask questions to get clearer instructions.

Following exact instructions often results in doing things wrong, until the group provides clear instructions. For example, if a participant tells the instructor to get out two pieces of bread, the instructor could rip open the loaf of bread rather than untie the bag.

3. Continue the exercise until participants begin providing clear instructions. This may happen after just a few minutes, or it may be necessary to continue the exercise right through cleaning up after the sandwich is made.

4. Facilitate a discussion about the purpose of this activity and what was learned, using some or all of these questions. [Desired responses are noted in brackets.]

*Has anyone been in a situation like this in which misunderstandings can happen within seemingly simple communications?*

*What is the goal of this exercise and of communication, in general?* [To be understood.]

*How did assumptions get in the way of clear communications?*

*When did the task become easier?* [When the instructions became specific enough for the sandwich to be made; i.e., when the instructor and person giving the instruction understood each other.]

*How long did that take?*

*What can you do if information is not clear?* [Ask questions to clarify.]

*How can you communicate to another person what you heard them say?* [Repeat in your own words, or paraphrase.]

*How would this exercise have been different if I had repeated the instructions in my own words or asked clarifying questions before following instructions?*

*How does this interaction relate to the beginning of a consumer–personal assistant relationship?*

5. Wrap up discussion by asking participants:

*How will what you've seen in this exercise affect how you communicate with others?*

6. Explain the next activity will help participants develop their skills in Paraphrasing and Asking Open Ended questions.

## Activity 6.7 Active Listening: Paraphrasing and Asking Open-Ended Questions

60 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Define paraphrasing and open-ended questions; and*

*Explain the importance of these skills for effective communication and supervision.*

### Key Content

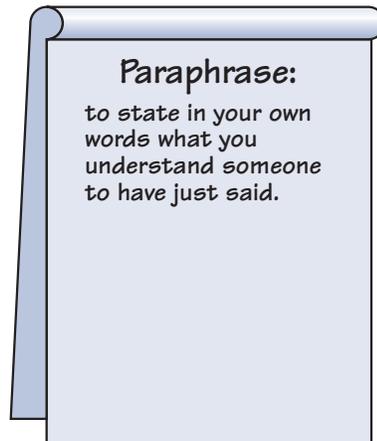
- Paraphrasing and asking open-ended questions are essential techniques in active listening and supervision. They can be used to gather additional (and more accurate) information from personal assistants and to ascertain that you have correctly understood what they're saying. These steps are essential before effective problem solving can take place.
- Paraphrasing means stating in one's own words what someone just said. It has multiple purposes, including to:
  - Help the listener "keep up" with the story being told by slowing down a conversation in order to understand the details being conveyed.
  - Demonstrate to the speaker that he or she has been heard, which people deeply appreciate.
  - Provide an opportunity for any misunderstanding to be cleared up early on. False assumptions, errors, and interpretations can be corrected on the spot.
  - It can slow anger and help the speaker and listener cool down as they focus on clarifying information instead of reacting.
  - When paraphrasing, it's much harder to fall into the traps that block listening, such as the temptation to judge. The listener's focus is on really understanding what is going on with the speaker.
- Open-Ended Questions are used to solicit more information, gather more details, or simply to engage or invite someone to talk further. They often begin with *how*, *what*, or *why*.
- Closed questions result in a simple "yes" or "no" or in factual answers, and tend to bring the conversation to a stop, requiring more questions to obtain the full story.
- Used together, paraphrasing and asking open-ended clarifying questions greatly enhance communication. They are vital to successful coaching supervision because:
  - They allow for more complete understanding of a given situation.
  - They help establish and continue a positive relationship between the supervisor and worker.
  - They set the stage for appropriate and effective problem solving by providing space for the worker to think about the problem, take ownership, and propose solutions.

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### Activity Steps

#### Interactive Presentation (20 minutes)

1. Display and review the pre-written flip chart definition of “paraphrase.” Emphasize that paraphrasing has multiple purposes related to Active Listening (see Key Content).



2. Distribute Handout 47, “Paraphrasing,” and review. Provide two or three examples of paraphrases that are pertinent to the audience. Note that if paraphrases are not said in a supportive, non-blaming and non-judging way, this will prompt the PA to respond defensively to the underlying judgment or blame. By ensuring that paraphrases reflect understanding and respect, the consumer will draw out the PA.

3. Distribute and review Handout 48, “Lead-ins for Paraphrasing.” Explain that the Lead-Ins are not the only way to paraphrase; they are meant as a starting point and as a guide to help generate thinking about how to paraphrase. (If participants took earlier workshops, note that paraphrasing was introduced in Module 4 as a key skill in conducting effective interviews with candidates because it is so helpful in encouraging people to share information.)

4. Distribute and review Handout 49, “Closed versus Open-Ended Questions.” If appropriate, note that this skill was also introduced in Module 4 to help draw out candidates during interviews.

#### ► Teaching Tips

Note that using the lead-ins and paraphrasing (in general) at first can be awkward. Emphasize and explain that this is because we are taking paraphrase out of the normal context of everyday conversation.

#### Pairs work (25 minutes)

5. Introduce the Paraphrase and Open-ended Questions bingo game. Distribute Handout 50, “Paraphrase and Open-Ended Bingo” boards. Explain the rules and carry out the exercise:

- Each row contains a series of statements or questions that either need to be paraphrased in a non-blaming and non-judgmental way or about which you need to ask an open-ended question to obtain more information. All of the statements are something that a PA might say to you as a supervisor.

- Pair people up. Together they are to determine which horizontal row or diagonal they'd like to work on in order to achieve "bingo." (Note this game is not like a typical bingo game with a "caller.") Each pair is to work together to write the five paraphrases and open-ended questions needed to get "bingo" in their row or diagonal.
- When a pair completes 5 squares across or diagonally, they must bring the game board to one of the instructors for verification. After the facilitator checks and ensures that the questions are open-ended and the paraphrases are blame-free and non-judgmental, the pair wins. The first pair to get "bingo" is the winner.

### ► Teaching Tips

If after a winner has been declared and the teams appear to be enjoying the game and/or working intensely, you may allow more time for the other pairs to complete their task.

### Discussion (15 minutes)

6. After everyone has settled down, review 5 or 6 boxes (ones that seem provocative or particularly pertinent to the group) by having pairs read off what they came up with. Discuss the answers to be sure they are open questions or non-blaming, non-judgmental paraphrasing.

Give everyone a prize, after giving winners first choice.

7. Debrief by asking participants:

*Do you feel clear now how to paraphrase and ask open-ended questions?*

Discuss concerns or questions. Ensure everyone that it takes practice and they will keep learning how to do it better as they practice it in real life.

—Teaching Notes—

*–Teaching Notes–*

## Activity 6.8 Closing

15 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Identify at least one thing they learned in this session that they will use when they supervise their personal assistants.*

### Key Content

- Providing closure to the day is an essential part of training. This time allows the trainer to wrap up the day's discussions, answer additional questions, and convey the next steps to the group. In addition, the end of day wrap up allows participants to share what they learned—subsequently providing an informal evaluation for the trainer to know what parts of the training was most useful.

### Activity Steps

#### Discussion

1. Explain that this is the end of the first module of the workshop, “Supervising Personal Assistants.” It’s time to reflect on what participants learned and how that learning can be applied to their personal situations. Ask participants:

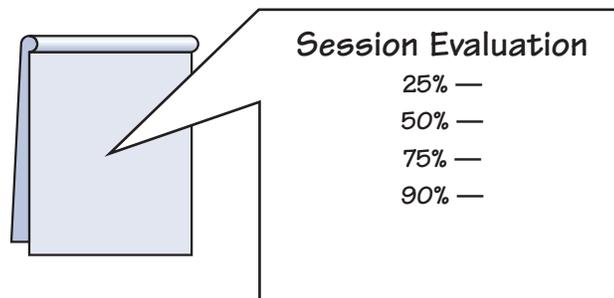
*What is the most important thing you learned today?*

*How do you think you can apply what you learned to your own situation?*

*What kind of follow-up activities would help you to reinforce what was covered during this workshop?*

2. Explain that the next module will focus on skills for effectively and constructively supervising their personal assistants, including self-awareness and self-management. Again, our goal is to help them enjoy long and positive relationships with the PAs they hire.

3. Conduct a quick evaluation by asking participants, “How much of today’s session was a good use of your time?” Invite them to vote for the percentages you have listed on the prepared flip chart.

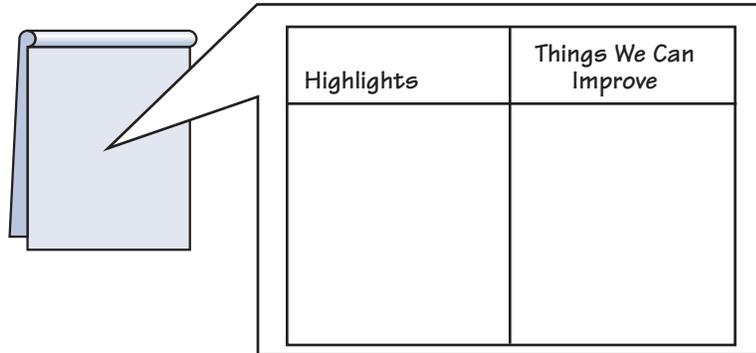


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## Module 6: Basic Supervisory Skills

Activity 6.8, continued

4. After they've voted and you've recorded the responses (praising those who give lower ranking for their honesty), ask them to tell you what worked really well for them—the highlights, and what they think could be better—the “low-lights.” Record ALL answers on the flip chart.



The image shows a flip chart with a table. To the left of the table is a drawing of a flip chart with a blue cover and a white page. A line connects the flip chart to the table. The table has two columns and two rows. The top-left cell is labeled 'Highlights', the top-right cell is labeled 'Things We Can Improve', and the bottom two cells are empty.

Highlights	Things We Can Improve

5. Thank participants who give you critical feedback and emphasize that it will help you make future sessions better for participants.

6. Give participants the details, including the time and date, of the next session, if appropriate.

7. Say good-bye and wish participants well in their efforts to apply the skills and understandings they've gained at the session.

# **EMPLOYING, SUPPORTING, AND RETAINING YOUR PERSONAL ASSISTANT**

## **A Workshop Series for People with Disabilities**

### **Handouts**

**Workshop III: Module 6  
Introduction to Basic Supervisory Skills: Active  
Listening**

# Supervising Personal Assistants

## Goals & Objectives

### **Workshop Goals:**

- To introduce participants to the purpose of supervision and the skills needed to use a coaching approach.
- To help participants understand the role of supervision in getting their needs and preferences met.

**Objectives:** After completing this workshop, participants will be able to:

- ◆ Describe the purpose, roles and responsibilities of supervision.
- ◆ Identify the qualities of a great supervisor.
- ◆ Understand what skills are required to be a coach-supervisor, including active listening, self-awareness, self-management, and giving constructive feedback.



# Supervision

# Supervisory Functions

As presented in Module 1's Presentation on the  
**Agency Model and the Consumer-Directed Model**

	Routine Function/ Concern
<b>RECRUIT PAS</b>	Advertise and recruit PAs (including costs)
	Screen applications and interview candidates
	Check employment references
	Hire PAs
	Calculate yearly salary, weekly pay, and benefits
	Ensure PA paperwork is in order and submitted
<b>MANAGE SERVICES</b>	Review and submit PA timesheets
	Schedule PAs
	Establish, implement, and manage back-up and emergency plan for when a scheduled PA cannot work or is on vacation
	Maintain accurate records on PAs; report changes
<b>OVERSEE FISCAL &amp; LEGAL</b>	Coordinate all matters related to PA taxes and benefits
	Cover PA work-related injuries or illnesses under the terms and conditions of the Worker's Compensation Policy
	Pay PAs based on timesheets submitted
	Ensure PAs have annual TB test and physical exam
<b>SUPERVISE PAS</b>	Determine which duties PAs will and will not perform
	Hold supervisory meetings with PAs regularly
	Determine training needs
	Provide feedback, evaluation, praise
	Fire undesirable PAs

Other Responsibilities:

# Coaching Supervision Role Play Scenario

**Laura** is a member of *I-Choose*, a consumer-directed program where she is able to employ her own Personal Assistant's (PAs). She is new to employing her own PAs but has experience in supervising staff as she is the manager at the local copy shop. Laura has been using a motorized wheelchair to get around since a car accident left her paralyzed from the waist down eight years ago.

**Isabel** is one of Laura's evening PAs. Laura hired Isabel four weeks ago to replace Isabel's best friend, Amy, who moved away to go to college.

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**Narrator:** *Isabel rushes into Laura's house at 6:20 p.m. with a McDonald's bag in her hand.*

**Isabel:** Hi Laura! I'm so sorry I'm late. You know how traffic gets around here!

**Laura:** Hi Isabel, I'm glad you're here, but I'm very upset that you're late again.

**Isabel:** I'll try to correct it but sometimes it's really hard to get here.

**Laura:** I know traffic is bad sometimes Isabel, but this is the third time you've been late this week. Today it's 20 minutes, yesterday it was 10 and on Monday you were over a half hour late. I'm wondering if something else is going on that's making it hard for you to get here on time. If so, I'd really like to hear about it.

**Isabel:** It just seems like everybody's trying to get home, when I'm trying to get to work.

**Laura:** I'm sure that's frustrating for you and I can remember how frustrated I used to get with the traffic when I was driving. I know you realize how much I need to be able to count on you being here on time and that you're getting here late has real hard consequences for us both.

**Isabel:** I do and I guess there'll always be traffic problems.

**Laura:** No doubt about that, and it sure isn't something we have a great deal of control over. This is something that's come up just in the past week, so can we talk a little more about what's up for you?

**Isabel:** Sure.

**Laura:** First, I want you to know how that just in the little bit of time we've been working together you've made such a difference in my life. I was happy for Amy when she decided to go back to school. But honestly, I was also a little worried about who I could find to help me. And you've picked right up where Amy left off. I can see why you're such good friends. So, I really want this to work out between us.

**Isabel:** Laura, that's really nice to hear. Thank you.

**Laura:** So tell me, is there something else happening besides traffic that's getting in the way of you leaving home in time to get here?

**Isabel:** Well that's the thing; I'm not coming straight from home.

**Laura:** Oh, I didn't realize that. Is the reason for the change something you're willing to talk about?

**Isabel:** Sure. I started taking a first aide class at the community college last week. I didn't mention it because I figured I'd have enough time to get here.

**Laura:** That's really great news about the class.

**Isabel:** Yeah, I thought it would be good to know a few more things about emergencies, just in case something ever happens to you; and you know I didn't have much training before I started working with you. Actually, working with you has made me think more about a career in health care.

**Laura:** That's great Isabel. But it does seem like that the class is stopping you from getting here at 6:00. You said you thought you wouldn't have a problem getting here on time after the class. Did something change?

**Isabel:** No, not really. The class is supposed to end at 5:30, which I thought would give me enough time. But with the traffic and distance between there and here, it seems like the best I can hope for is 6:00 pm on the nose and that's when we get out on time!

**Laura:** Hmm... I see. Have you done anything so far to try to deal with the situation?

**Isabel:** Well, I spoke to the teacher already and getting out early isn't really possible.

**Laura:** Well that was a good attempt. Too bad it didn't work. Have you thought of anything else?

**Isabel:** Sort of; since the class is only for 10 weeks I was thinking of asking you if we could push my schedule to be 6:30 p.m. to 12:30 a.m. Instead of 6-12. Just for the time I'm in class. Would that be possible?

**Laura:** Well, I'm not sure. You know, I like to eat dinner around then and get ready for running my errands or getting to my evening appointments.

**Isabel:** Well, I thought about that and how busy that time can be. I was speaking with the daytime PA about my class and how hard it is to get here on time. Anyway, she'd mentioned that she wanted more hours and that she'd be willing to work until 6:30 p.m. on the days I have class. So, I was thinking maybe she could stay until I get here?

**Laura:** I can see you've already done some thinking and planning and I really appreciate that. I'm still worried though that would be cutting it too close to get to my 7:00 p.m. Wednesday appointment on time. If you get here over half an hour late like on Monday, by the time Heather's on the way out and you're coming in, it's already 15 minutes lost. And we need at least half an hour to get ready and get there.

**Isabel:** Yeah, that was late and I'm so sorry about that. But that day I talked with my teacher after class *and* stopped to get dinner. I could get here no later than 6:15 on

Wednesdays if I left as soon as the class ended and didn't stop. That even leaves time for you, me, and Heather to talk if we needed to fix schedules, make plans, or address things that need follow up.

**Laura:** So you are saying that if you leave as soon as your class finishes, and don't stop for dinner, you can be here by 6:15?

**Isabel:** For sure.

**Laura:** For Wednesdays that might need to be the case, but I'm concerned about you not eating before getting here. It's tough working on an empty stomach.

**Isabel:** Well, I'll just have to be sure to eat before class, or even during class. The teacher doesn't seem to mind us eating. I've seen others doing it.

**Laura:** Okay, so it sounds like we may have a plan that can work out. Just to make sure we're on the same page, let's go over what we agreed to do.

**Isabel:** So, if Heather agrees, she'll work until 6:30 until my class is over, and I'm going to get here no later than 6:30 except for Wednesdays when I have to be here by 6:15. And somehow, I'll eat before I get here so I'm ready to work when I walk in the door.

**Laura:** That's how I understand it, too. But before we can make this work, I'll need to speak with Heather myself about changing her schedule temporarily. And, we'll need to talk about this again, if Heather isn't willing or able to change her schedule.

**Isabel:** No problem. But she seemed like she was okay with the change.

**Laura:** That will be great. And if she does agree to the new schedule, how about we do a check-in at the end of the first week to see how it's working for you.

**Isabel:** Don't worry; I'll make sure the plan will work.

**Laura:** Okay, then. Now let's hurry up and eat so I can get to my creative writing class.

# Role Play Scenario

## Traditional Supervision

**Laura** is a member of *I-Choose*, a consumer-directed program where she is able to employ her own Personal Assistant (PA). She is new to employing her PAs but has experience in supervising staff as she is the manager at the local copy shop. Laura has been using a motorized wheelchair to get around since a car accident left her paralyzed from the waist down eight years ago.

**Isabel** is one of Laura's evening PAs. Laura hired Isabel four weeks ago to replace Isabel's best friend, Amy, who moved away to go to college.

---

**Narrator:** *Isabel rushes into Laura's house at 6:20 p.m. with a McDonald's bag in her hand.*

**Isabel:** Hi Laura! I'm so sorry I'm late. You know how traffic can be!

**Laura:** Isabel, this coming in late all the time is completely unacceptable! You've been late *every night this week* and I haven't said anything because I didn't want to make trouble.

**Isabel:** You're yelling at me for 20 minutes?

**Laura:** I'm not yelling at you, I'm just telling you this is unacceptable. And to make matters worse today, you come in carrying your dinner. You need to be here on time and ready to do your job, not eating your dinner first.

**Isabel:** Well, I HAVE to eat something! You can't expect me to help you all night on an empty stomach. Like I said, the traffic is horrible at this time.

**Laura:** If the traffic is horrible, then you need to leave earlier to get here or drive faster. And if you have to eat, then you need to get here even earlier! If you're not on time then I can't get to my appointments. And I have to count on YOU! Is that a problem for you?

**Isabel:** No, not really.

**Laura:** So you understand what I'm saying to you then?

**Isabel:** Yeah, I guess you're saying if I can't be here on time, then you'll fire me? Don't worry, it won't happen again.

**Laura:** Look Isabel, it's not like I want to fire you. I need you and want you here on time. Do you think you can be here at 6 from now on?

**Isabel:** Yeah, and don't worry I'll try my best.

**Laura:** Isabel, I mean it. I need you to DO it, not just try. If you're late again, I'll just have to start looking again for someone else.

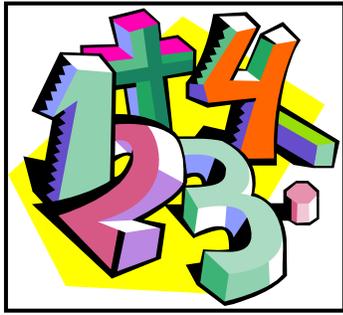
**Isabel:** Yeah, I get it. I'll be here.

# Comparison of Traditional and Coaching Supervision

## When a Problem Comes Up

Traditional Supervisor	Coaching Supervisor
<ul style="list-style-type: none"><li>• Identifies issues to be addressed</li></ul>	<ul style="list-style-type: none"><li>• Creates a positive relationship with the PA</li></ul>
<ul style="list-style-type: none"><li>• Explains the rules clearly</li></ul>	<ul style="list-style-type: none"><li>• Clearly presents the problem</li></ul>
<ul style="list-style-type: none"><li>• Explains the consequences of breaking the rules</li></ul>	<ul style="list-style-type: none"><li>• Gathers information about the PA's perspective</li></ul>
<ul style="list-style-type: none"><li>• Offers possible solutions to the problem</li></ul>	<ul style="list-style-type: none"><li>• Engages in problem-solving with the PA</li></ul>
<ul style="list-style-type: none"><li>• Requests or directs the personal assistant to comply with the rules</li></ul>	<ul style="list-style-type: none"><li>• Helps the PA commit to action steps</li></ul>



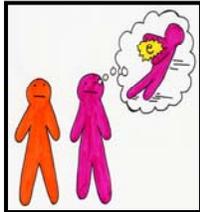


# Four Primary Coaching Skills



## Active Listening

Using skills such as body language, paraphrasing, and asking open-ended questions to listen attentively and ensure understanding.



## Self-Management

Setting aside emotional reactions and other listening blocks that get in the way of hearing a worker's perspective.



## Self-Awareness

Being conscious of the assumptions and biases that lead to prejudging workers and others.



## Presenting the Problem

Using objective language to identify a performance problem and holding him or her accountable for correcting the problem.

# Three Skills of Active Listening!



## Nonverbal Communication Skills

Refers to the way people communicate without actually speaking--for example, through facial expressions, eye contact or gestures.



## Paraphrasing

The ability to state in your own words, from your own understanding, what you understood someone to have just said or expressed.



## Open-Ended Questions

These questions are used to find out more information about a situation. They tend to start with the words: How, What, and Why.

# PARAPHRASING!

## Paraphrase

1. To *paraphrase* means to state in your own words – in a supportive, non-blaming and non-judging way – what you understand someone to have just expressed or said, what they *meant* by what they said, or what emotions they were expressing.
2. Paraphrasing is absolutely necessary to effective listening. It keeps you engaged and helps you to better understand what the other person means. It also lets the speaker know that you are listening.
3. When paraphrasing, repeat the statement in a positive way, without blame or judgment.



### Rewards of Paraphrasing:

- People LOVE feeling listened to! Don't you?
- Paraphrasing can stop anger and cool down a crisis. It keeps your focus on clarifying information rather than reacting to the situation.
- Paraphrasing prevents miscommunication – false assumptions, errors and misinterpretations can be corrected on the spot.
- Paraphrasing helps you remember what was said.
- When you paraphrase it's much easier to stay focused and not lose your concentration. You keep your focus on really understanding what is going on with the other person.
- Many people tend to move straight into problem solving without confirming the accuracy of information or gathering enough information. Paraphrasing helps you get all the information you need **before** effective problem solving can take place.

## **Lead-Ins for Paraphrasing...**

**Did I hear you say...**

**So, I think you said...**

**What I heard you say is...**

**So I understand you said...**

**You're telling me that...**

**Am I hearing you correctly that...**

**Let me make sure I got what you just said...**

**I believe that you are saying...**

**OK, let me see if I got what you said...**

**So I understand the situation, let me summarize what you just said...**

**I want to be on the same page as you, so let me go over what you just said...**

# CLOSED VS. OPEN-ENDED QUESTIONS

## Open-Ended Questions

- Begin with *how, what, or why*
- Are used to clarify information
- Encourage a person to share as much as they wish

## Closed Questions

- Result in a simple “yes” or “no” or short, factual answers
- Tend to stop conversation and require more questions to get the full story

## SAMPLES:

### Drugs/Alcohol:

- **Closed:** Would you work with someone who drinks?
- **Open:** What do you think about people who drink or do drugs?

### Personality/Friendliness:

- **Closed:** Do you have a lot of friends? Do you like to go out?
- **Open:** How do you spend your free time? How would your best friend describe you?

### Sense of Humor/ Personality:

- **Closed:** Do you have a sense of humor?
- **Open:** What makes you laugh?

### Cooking:

- **Closed:** Do you like to cook? Can you cook? Would you be able to cook for me?
- **Open:** If you were to prepare your favorite meal for me, what would it be?

### Flexibility/ Availability:

- **Closed:** Do you think you have time to do this job given my schedule?
- **Open:** What are some of responsibilities in your life right now? How will the schedule I require fit with your current responsibilities?

### Computer:

- **Closed:** Can you use the computer?
- **Open:** How do you feel about working with computers? What programs do you use on the computer?

## Paraphrase and Open Question Bingo!

**Paraphrase this!:** These are statements said to you by your Personal Assistant.

**Ask a question:** The statement in this column was said by a Personal Assistant to you, create an open ended question that will help you gain more information about the situation.

Paraphrase this!	Ask a question	Paraphrase this!	Ask a question	Paraphrase This!
I'm sorry I forgot to drop off your prescription on my way home yesterday. I completely forgot because I was so tired.	My boyfriends' mother just got approved for home care and she wants <b>me</b> to be her regular weekend assistant!	I know I signed up for weekends, but I just can't do it any longer.	I don't know if I can continue working with you keep doing that.	It's been really nice knowing you. Today is going to be my last day.
I know I'm late again and I'm really sorry. I swear if you give me another chance, it won't happen again.	I really like doing this work but I'm not sure it's going to work out for me as a job.	You know, I think you should lose some weight. It would make my job a lot easier.	You're other personal assistant is such a sweetheart.	I had to use \$10 dollars of my own money to buy groceries today.
You're not dividing the work fairly between me and the other PAs.	I thought I was going to get training through this job.	FREE SPACE	I never have what you need when I'm making your dinner.	I wish you didn't live in the boon-docks!
I wish you had more will power when it came to eating. You're killing yourself by eating all those sweets.	This isn't the way I learned how to give a bath.	My kids are growing up so fast and I barely get to spend time with them. I'm thinking about taking the whole summer off.	The schedule you gave me for next week won't work.	I always feel rushed when I'm here. Is there any way you can give me more hours?
The way things are going today, I'll have to camp out in your back bedroom!	I am in so much pain at the end of the day.	I can't believe it's been almost two weeks that your other PA has done the dishes before she's left for the day.	I'm worried about this snow storm that will hit this weekend.	My husband is very opinionated about me working for you.

# Module 7

## Supervisory Skills II: Self-Awareness, Self-Management, and Constructive Feedback

### Goal

- To introduce consumers to three basic skills necessary for effective supervision: self-awareness, self-management, and constructive feedback.

### Time

3 hours plus breaks

Activities	Teaching Methods	Time
7.1 Welcome & Homework Review	Discussion	20 minutes
7.2 Awareness of Self and Others in Supervision: Blocks to Listening	Interactive presentation, small-group work, discussion	50 minutes
7.3 Self Management in Supervision: Pulling Back	Role play, discussion, brainstorm, individual work	45 minutes
7.4 Giving Constructive Feedback	Large-group exercise, discussion, pairs work	45 minutes
7.5 Closing	Discussion	20 minutes

**Note:** Instructors may want to add additional time for a closing celebration.

### Supplies

- Flip chart, easel, markers, tape
- Paper and pens or pencils
- Flip chart from Module 6, “What I hope learning about supervision will do for me”

**Note:** An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use overheads, make sure you have the necessary equipment and screen. (Some PowerPoint slides are provided on your CD. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.)

### Handouts

- Handout 51: “Blocks to Listening”
- Handout 52: “Pulling Back”
- Handout 53: “Simple Rules for Giving Feedback”
- Handout 54: “Addendum to Feedback Foibles”

### Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants’ physical needs.

Review the teaching materials for each activity.

If using an overhead or LCD projector, set up equipment, as necessary, for optimum viewing by all participants.

Post “Workshop III: Goals and Objectives” where everyone can see it.

#### Activity 7.1 Welcome & Homework Review

Prepare a flip chart page with the day’s agenda, including breaks, to review with participants.

Have flip chart page from Module 6 with responses to “What I hope learning about supervision will do for me.”

#### Activity 7.2 Awareness of Self and Others in Supervision: Blocks to Listening

Copy Handout 51, “Blocks to Listening,” for all participants.

Prepare a flip chart page with a list of all the blocks, as shown in step 7.

#### Activity 7.3 Self-Management in Supervision: Pulling Back

Copy Handout 52, “Pulling Back” for each participant.

Prepare a flip chart page with the definition of Pull Back and steps for pulling back, as in step 6.

If there is no co-instructor, ask for a participant volunteer to help you with the demonstration role play. Explain that he or she will play a personal assistant who is angry and disrespectful toward the consumer. A sample role play is provided in the Teaching Tips accompanying step 2.

Be prepared to share personal experiences of situations that have provoked you, choices you’ve made, and successful pull back strategies you use today.

#### Activity 7.4 Giving Constructive Feedback

If doing the alternative activity for step 5, copy the Instructor’s Guide “Feedback Foibles,” and cut into individual statements that can be distributed to each participant.

Copy Handout 53, “Simple Rules for Giving Feedback.”

Copy Handout 54, “Addendum to Feedback Foibles.”

Prepare a flip chart page with the definition of feedback, as shown in step 8.

**Activity 7.5 Closing**

Have the “Hopes” flip chart from Module 6 ready.

Prepare a flip chart page to record evaluation scores as shown in step 3.

*—Teaching Notes—*

*–Teaching Notes–*

# Activity 7.1 Welcome & Homework Review

20 minutes

## Learning Outcome

By the end of this activity, participants will be able to:

*Describe the workshop goal and objectives and the day's agenda.*

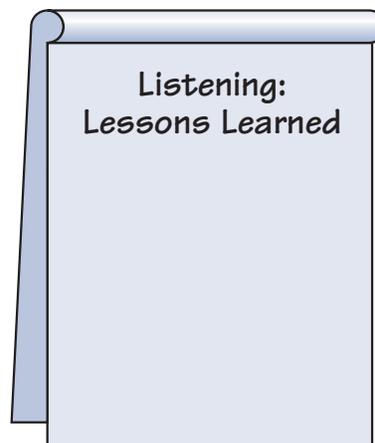
## Key Content

- The focus of today's activities is on continuing to build skills needed to effectively supervise personal assistants using the coaching supervision approach.
- The last session covered active listening skills, including asking open-ended questions and paraphrasing. This session introduces self-awareness and self-management skills, both of which are essential to becoming an effective supervisor. Self-awareness and self-management prepare consumers to give feedback constructively and thereby maintain positive relationships with PAs.
- Using these skills will make it more likely that consumers will have great relationships with their PAs, be able to address problems and needs that arise, and keep PAs they value with them longer.

## Activity Steps

### Discussion

1. Welcome everyone back to the workshop. Ask if anyone has any concerns or stories that have come up since the last meeting. *Have they practiced their listening skills? How did it go?* Write highlights on a flip chart page.



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## Module 7: Supervisory Skills II

Activity 7.1, continued

### ► Teaching Tips

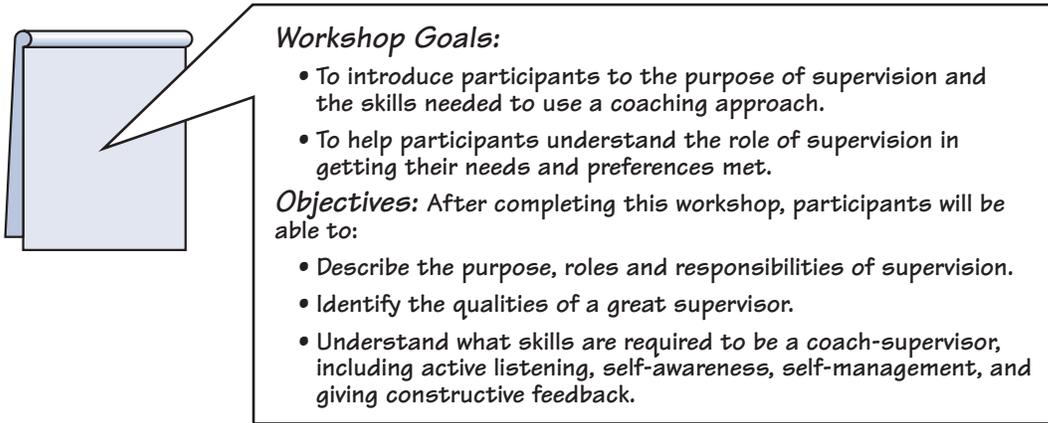
If participants already know one another, consider an ice-breaker to energize participants and prepare them for the day. For instance, with the rule that all questions must be open, the instructor can introduce him or herself and then ask an open-ended question of an individual in the class. This person introduces him or herself, answers the question, and then asks another question of another individual in the class, and so on until everyone is introduced. Sample questions might include:

*What do you like most about consumer self-direction?*

*What's your favorite place in the world and why?*

*Where would you most like to go on vacation and why?*

2. Referring to the prepared flip chart, review the workshop goal and objectives. Note what was accomplished in the last session and the focus of today's activities.



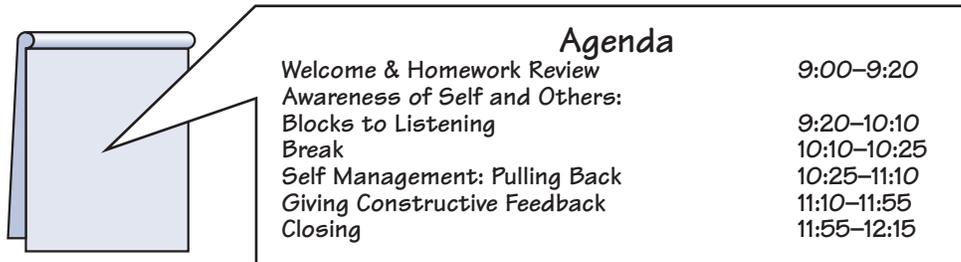
**Workshop Goals:**

- To introduce participants to the purpose of supervision and the skills needed to use a coaching approach.
- To help participants understand the role of supervision in getting their needs and preferences met.

**Objectives:** After completing this workshop, participants will be able to:

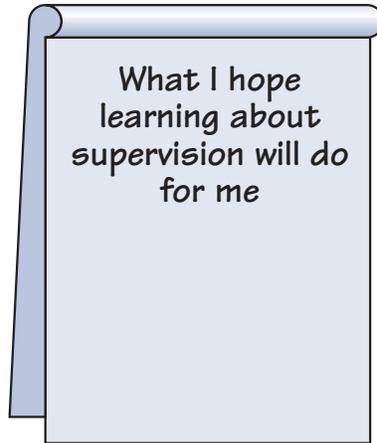
- Describe the purpose, roles and responsibilities of supervision.
- Identify the qualities of a great supervisor.
- Understand what skills are required to be a coach-supervisor, including active listening, self-awareness, self-management, and giving constructive feedback.

3. Review the flip chart with day's agenda, noting activity and break times. If participants have attended the entire workshop series and you have planned a celebration at the end of the workshop, note when the celebration will begin.



Agenda	
Welcome & Homework Review	9:00–9:20
Awareness of Self and Others:	
Blocks to Listening	9:20–10:10
Break	10:10–10:25
Self Management: Pulling Back	10:25–11:10
Giving Constructive Feedback	11:10–11:55
Closing	11:55–12:15

4. If applicable, review the “What I hope learning about supervision will do for me” flip chart from Module 6, Activity 1, and ask participants, “Are we addressing your hopes?” Highlight what’s coming up in the session that you believe will address specific hopes.



*–Teaching Notes–*

*–Teaching Notes–*

## Activity 7.2 Awareness of Self and Others in Supervision – Blocks to Listening<sup>1</sup> 50 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Identify the most common blocks to listening;*

*Individually, identify the three blocks that most often keep them from listening as effectively as they can; and*

*Be more aware of these blocks in themselves as they arise in listening situations.*

### Key Content

- Blocks to listening are distractions, usually unconscious, that keep us from listening with our full attention.
- Everyone experiences blocks to listening at least some of the time. It is very common not to listen 100% of the time with 100% effort because listening well is difficult and takes a lot of energy and concentration. It is true that everyone has the *ability* to listen well, but various distractions get in our way.
- We oftentimes unconsciously *block* ourselves from listening for various reasons.
- In order to “unblock” our listening, we must first become aware of the times we get distracted. Becoming aware of one’s blocks is the first step in changing listening behavior because it helps to consciously put the blocks aside and bring one’s full attention to listening.
- Since listening is a vital skill in supervision, it is important to become aware of when and why we *stop* listening, especially in supervisory interactions.

### Activity Steps

#### Interactive Presentation (25 minutes)

1. Ask:

*Has anyone ever day-dreamed or “zoned out” when someone was talking to you or telling you a story? Or done this during a class lecture?*

Ask for a show of hands.

Affirm that that this happens to nearly everyone; we are all prone to zoning out from time to time.

– Continued next page

<sup>1</sup> The “Blocks to Listening” activity and handout have been adapted from McKay, Matthew, Davis & Fanning, *Messages: The Communication Book* (1995).

## Module 7: Supervisory Skills II

Activity 7.2, continued

2. Ask participants to picture a person in their head that they have had a difficult time listening attentively to in the past. Now ask:

*What happens for you when you are with this person?*

*Where is your mind?*

*What are you thinking?*

► **Teaching Tip**

To break the ice, it is very helpful at this point to share a personal experience of having a difficult time listening to a particular person.

3. Explain that in this session the group will talk about common listening blocks and explore what blocks they experience most frequently. Distribute the Handout 51, “Blocks to Listening” and review the Key Content.

4. Read the first listening block (or have a participant read it aloud). Provide an example of the block, either by referring to the one described on the handout or by offering another that is more relevant to your participants.

► **Teaching Tips**

Provide examples that are true to you and do not hesitate to own them. Owning them (by saying “this block applies to me,”) demonstrates that is acceptable to have blocks to listening.

If possible, try to connect the participants’ stories shared earlier to particular listening blocks (only do this if you sense the person who shared the story wouldn’t be offended by your bringing it back into the conversation). For example, a person who shares that she does not listen to her husband because she knows what he is going to say next may be “mind reading.”

5. Move to the next block. Read it aloud and provide another example. Ask the group if any of them can relate to this. Look for nods or hands, and ask if anyone would like to share a story about how this block comes up for them.

6. Continue to review the remaining blocks. Engage the group by continuing to share examples, and encouraging them to share as well. The more open and willing you are to disclose your struggles with the listening blocks, the easier it will be for participants to acknowledge these blocks in themselves.

7. After going through all the listening blocks, display the prepared flip chart with all the listening blocks listed. Ask participants to write down their three most common listening blocks in the space provided at the bottom of Handout 50. Give participants a few minutes to do this.



► **Teaching Tip**

There are additional blocks to listening than those on the handout. Invite participants to share anything else they feel blocks their listening particularly if they feel they cannot find "their blocks" on the handout.

8. When the group has finished writing, explain that for the next fifteen minutes they will discuss their particular listening blocks in small groups.

### **Small-Group Work (15 minutes)**

9. Divide the group into groups of three. Explain that each person is to name his or her blocks and give examples of each of them, and then the group should discuss how common the challenges to good listening are.

Circulate among the groups during the discussions. Help ensure that conversations stay on track and that everyone gets a chance to share.

► **Teaching Tip**

Depending on the group size and comfort level within the group, this can be done in a large-group discussion or in pairs.

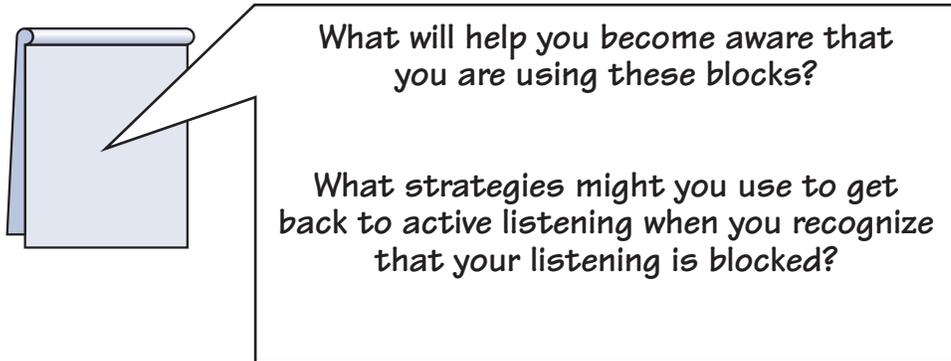
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## Module 7: Supervisory Skills II

Activity 7.2, continued

### Discussion (10 minutes)

10. After the participants have shared their blocks with each other, have participants join the large group. Debrief the activity using the following questions (particularly in the context of supervising a PA). Write the questions and responses on a flip chart page:



#### ► Teaching Tip

Before debriefing with the questions, invite people to raise their hands for their top three blocks and note the votes on the flip chart with the list of blocks. Use this to share acknowledgement that we all have to work on not being blocked.

11. If the following ideas are not suggested by the group, be sure to include them on the list:

- Do a mental check-in with yourself every minute or so while listening (abbreviate to “mental check-ins” on the flip chart).
- Practice listening to someone who knows you well, and ask them to point out every time they notice your attention straying (abbreviate to “practice with partner”).
- If you notice while someone is talking to you that listening is becoming more difficult for you, ask the person to pause for a moment. Ask yourself what blocks are coming up for you (abbreviate to “pause to find the cause”).
- When you notice your mind is straying, make a decision to paraphrase the next idea the speaker talks about in order to refocus (abbreviate to “plan to paraphrase”).

12. Remind the group that simply becoming *aware* of our blocks is the most important step in making the conscious choice to set them aside as we listen. Invite them to make a point of noticing when blocks come up for them in the next week. They may even want to reflect on their conversations at the end of day and consider how to avoid the blocks the next day.

## Activity 7.3 Self Management in Supervision: Pulling Back

45 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe how emotional responses often get in the way of their ability to listen attentively;*

*Explain that pulling back from their emotional responses often leads to more effective communication; and*

*Identify strategies for pulling back from their emotional responses.*

### Key Content

- When people are faced with situations or people who provoke an emotional response, listening can become difficult and communication emotionally charged. While people rarely have control over others' words or behavior, each person can control his or her own emotional responses and how they react in a situation.
- “Pulling back” allows a person to think more clearly (i.e., not get caught up in an emotional reaction), listen more effectively, better understand what was said, and reply more constructively. This kind of clear and objective thinking is important in supervising PAs.
- To manage one's emotions, one must first become aware of them. Most of the time, specific situations or people provoke certain emotions in a person. Identifying such situations in advance will help in pulling back when consumers actually encounter such situations.
- Pulling back from a PA's emotionally charged statements, followed by paraphrasing, will allow a consumer-supervisor to gain emotional control of him- or herself and open up the conversation to achieve positive resolution of problem situations instead of emotionally shutting down or otherwise managing the situation less effectively.
- Pulling back from an emotional response does not mean being soft or allowing dishonest employees to get away with something. In fact, using pull-back strategies makes it much less likely that a supervisor will be misled or manipulated. Maintaining objectivity allows for keener listening and fuller exploration of the situation with the personal assistant.

### Activity Steps

#### Demonstration Role Play (7 minutes)

1. Note that, in spite of our best efforts to understand our personal assistants, there may be times when we are annoyed by our PAs and find it difficult to stay calm.

– Continued next page

## Module 7: Supervisory Skills II

Activity 7.3, continued

2. Explain that the instructors will now conduct a brief role play to demonstrate one such situation. Ask your co-instructor or a participant volunteer (see Advance Preparation) to come forward. Introduce yourself as the consumer-supervisor and your assistant as the personal assistant, and conduct a role play that demonstrates a situation in which the consumer is upset but doesn't pull back (see Teaching Tip below).

### ► Teaching Tips

The first role play demonstrates a situation in which a personal assistant says something inappropriate to the consumer-supervisor, who by responding emotionally, aggravates the situation. An example is provided below; however, instructors should tailor the role play to situations known to be problems for participants.

**Sample scenario:** The PA is in the kitchen doing the dishes and the consumer is in the living room. The consumer-supervisor says, "You better hurry up; there's only an hour left of the day and you still need to clean the cat box, dust the living room, make the bed, and clean the toilet".

The PA shouts angrily, "Why are you always on my back! I'm not a child, I know what I need to do and if you keep telling me what to do, I'm going to scream!"

The startled consumer shouts back, "Well, believe me, I didn't mean to offend you. You may not be a child but you're sure acting like one now with all that screaming and yelling. If you can't take a few simple reminders, I might as well start looking for someone else who can!"

3. Ask participants:

*What did you observe about the consumer's response to the personal assistant?*

*How do you think the PA felt? Towards the end, what was the consumer's response?*

*What is the likely outcome for the relationship?*

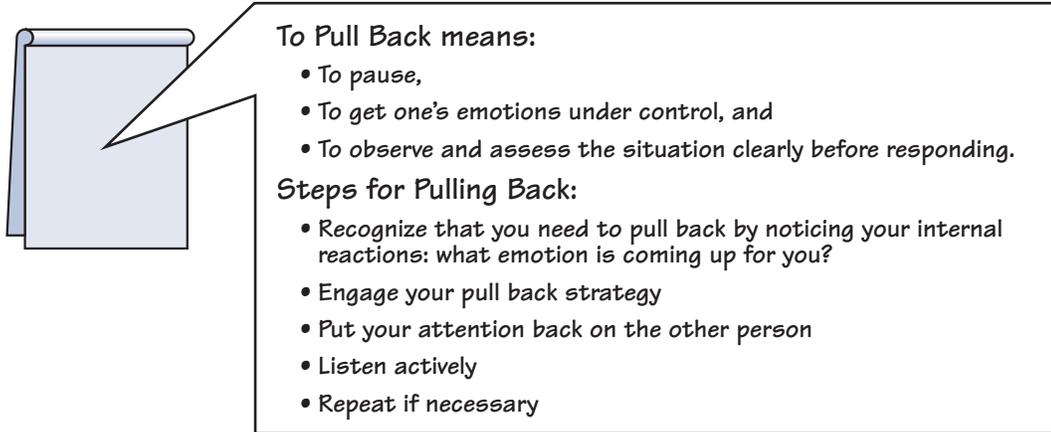
*How could the consumer have responded differently in order to get a better, more productive outcome?*

4. Emphasize that the consumer responded out of an emotional place—reacting to the PA's emotions. Review the first two bullets in key content and let participants know that you'll be revisiting the role play in a little bit. Remind participants that, as demonstrated in the listening and paraphrasing activities, people listen well when they bring their full attention to a conversation. However, having an emotional response to a speaker, or to his or her words, is one of the most powerful blocks to listening. In relationship-based supervision, listening is key.

### Discussion (8 minutes)

5. Distribute Handouts 52, "Pulling Back." Review Option A and option B and the impact of each. Show how Option B relates to the role play. If helpful, add a personal example (see Advance Preparation).

6. Turn to the prepared flip chart page with the definition of Pull Back and steps for pulling back. Review the definition and steps. Ask participants for examples from their own experience of when they might need to pull back and gain control over their emotions.



**To Pull Back means:**

- To pause,
- To get one's emotions under control, and
- To observe and assess the situation clearly before responding.

**Steps for Pulling Back:**

- Recognize that you need to pull back by noticing your internal reactions: what emotion is coming up for you?
- Engage your pull back strategy
- Put your attention back on the other person
- Listen actively
- Repeat if necessary

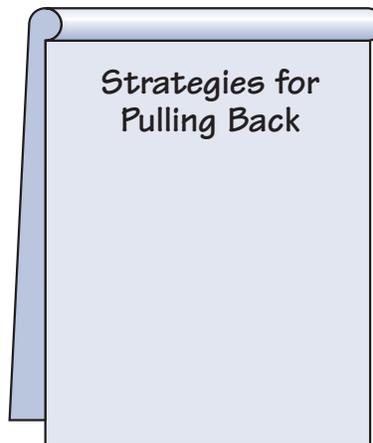
7. Explain that people use multiple strategies to pull back in stressful situations. The goal of this activity is for participants to become aware of the strategies they use and strengthen them and to learn new strategies.

**Brainstorm (10 minutes)**

8. Ask the group to brainstorm different strategies for pulling back. Ask,

*How can you gain emotionally control in 5 seconds or less?*

Write the strategies on a flip chart page. Briefly give examples of pull-back strategies that have worked for you, professionally and personally, to get things started.



**► Teaching Tips**

The list could include: take a deep breath, silently say a prayer, silently count to five, and silently say a personal affirmation such as "I have the strength to deal with whatever is happening here."

Some strategies may not be appropriate responses to stressful situations (for example, walking away). Redirect or reframe these responses before writing them on the flip chart page.

– Continued next page

## Module 7: Supervisory Skills II

Activity 7.3, continued

9. Explain to the group that there are two categories of pull-back strategies. The first are strategies that people use immediately (in the moment) when they are having an emotional response. The second are strategies people use when they know they are going to be in a potentially stressful situation, such as a difficult meeting or phone conversation, and there is time to prepare.

10. Quickly review the list you've created on the flip chart, and ask participants to identify which strategies are *immediate*, or in the moment, and which ones are *preparatory*. Label each strategy with an "I" or a "P." Some strategies will work well in either instance.

### ► Teaching Tip

Examples of preparatory strategies include: vent or talk to a coworker about the situation, listen to soothing music, and imagine yourself staying calm and collected during the situation. Some strategies may belong on both lists.

### Demonstration Role Play (10 minutes)

11. Repeat the role play, with the personal assistant exhibiting the same behavior and the consumer demonstrating a pull-back technique. Draw on participants' suggestions about how to better respond to the situation.

### ► Teaching Tips

For example, the consumer's response could be to take a deep breath and paraphrase what the PA said ("It sounds like you are very upset with me.")

The instructor should exaggerate the pull-back strategy because, in general, people are not aware of someone pulling back. However, in a demonstration role play, it should be very obvious.

12. Ask participants:

*What did you observe this time about the consumer's response to the PA?*

*How were both the PA and consumer feeling in this situation?*

*What is the likely outcome for the relationship?*

### Individual work and discussion (20 minutes)

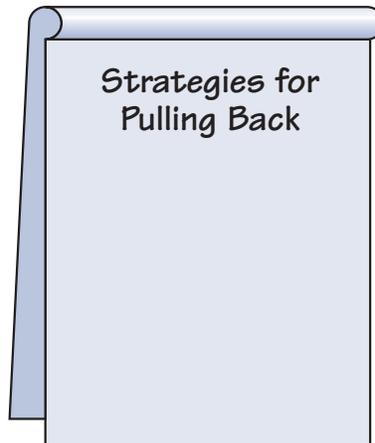
13. Pass out pieces of blank paper to participants. Ask everyone to divide their paper into two columns with the headings "Situations/People" and "Emotion that comes up for me." Ask them to think about the situations, behaviors and people in life that provoke them emotionally, and the emotions they raised. Have them take 10 minutes to write down what they think of in the two columns on their paper.

### ► Teaching Tips

The first images that come to mind when someone says, "What provokes you?" tend to be very strong and are directly useful in this pull-back activity. "Provoke" is intentionally used here to bring to mind previous emotionally charged situations.

Point out to participants that anger is not the only emotion that gets “provoked”—sadness, discouragement, helplessness, joy, and excitement are other feelings that are sometimes triggered. It is necessary to pull back from all of these emotions if the intention is to listen well.

**14.** Return to the large group and ask if anyone would like to share a situation, what emotion it stirred, and how they handled well. From the situations that were handled well, draw out effective pull back strategies that participants used. Check these off on the flip chart from step 8. “Strategies for Pulling Back.”



**15.** Ask participants to share situations that in hindsight, they would like to have handled differently.

► **Teaching Tip**

Participants may be shy in sharing situations they wrote and that is okay. If this is the case, have participants individually take a few moments to look at their lists to identify potential pull back strategies.

**16.** From the list of pull-back strategies, have each participant who shares a situation identify at least one preparatory and one in the moment strategy to use if they should face that situation/ person again.

**17.** To close ask participants to continuously pay attention to their emotional reactions to situations. Self-managing your emotions (managing when you implode or explode) is essential to establishing and maintaining healthy supervisory relationships. Thank participants for their efforts and sharing.

*–Teaching Notes–*

# Activity 7.4 Giving Constructive Feedback

45 minutes

## Learning Outcomes

By the end of this activity, participants will be able to:

*Describe two key aspects of constructive feedback; and*

*Explain the importance of giving constructive feedback to personal assistants.*

## Key Content

- One of the most important aspects of your role as a consumer-supervisor is giving feedback to Personal Assistants (PAs). When you give someone feedback, you provide useful information about that person's approach, skills, or responses in a situation. You may have one of two goals: (1) To express appreciation and reinforce the PAs actions when they meet your needs and preferences; and (2) to express that your needs and preferences have not been met and provide information that will change the person's actions by clarifying your expectations. Giving feedback will help develop a Personal Assistant's skills and build confidence.
- Effective feedback is always constructive. Constructive feedback is based on facts and observations, and is given with the belief that the other person can use the information to improve what isn't working or continue what is working in the relationship. Learning how to give helpful, specific, and descriptive feedback can be challenging and may take some practice.
- Constructive feedback addresses *both* what a personal assistant is doing well, and what he or she needs to improve in order to provide quality services for the consumer. If feedback focuses on only what a PA does well, he or she may come to question the sincerity of the feedback. If feedback addresses only what a PA needs to improve, he or she may become discouraged or resentful of you, and may even leave the job. Thus, a balance—weighted heavily in favor of the positive—is necessary.

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Activity 7.4, continued

### Activity Steps

#### Large-group exercise (20 minutes)

1. Write the following statement on a flip chart page and explain that this is “feedback” a supervising consumer gave to her personal assistant.



2. In the large group, ask participants why they think the consumer-supervisor said this to the personal assistant. Ask:

*What was her intention?*

Record responses on the flip chart.

#### ► Teaching Tip

If the list is not inclusive of several possibilities, add your own ideas. For example, one intention that participants might not mention is that the supervisor wants the personal assistant to train the other personal assistants.

3. Following this discussion, ask participants:

*How do you think the personal assistant felt after hearing this feedback?*

Add these responses under “Impact” on the flip chart.

4. Next, move on to outcome. Ask:

*What might the personal assistant do after hearing this statement?*

Record responses under “Outcomes” on the flip chart.

5. Continue this activity using statements on the Instructor’s Guide, “Feedback Foibles” (included at the end of this Activity Guide). Choose three or four statements that may have positive or negative impacts (or make up your own), and record the intention, impact, and outcome of each statement on the flip chart.

#### ► Teaching Option

##### **Pairs Work (10 minutes)**

Rather than continuing as a large group, place participants in pairs and distribute individual feedback statements prepared from the Instructor’s Guide, “Feedback Foibles” (see Advanced Preparation) to each pair.

Explain that on the slip of paper is a feedback statement given by a consumer-supervisor to a personal assistant. Tell the participants to take a moment to put themselves in the shoes of the PA receiving that feedback and think about and write down what they think is the Intention, Impact and Outcome after the supervisor says this to the personal assistant.

After about three minutes, ask for volunteers to share their feedback statement and responses (solicit responses from two or three pairs, having them read their statement first). Record responses on the original flip chart, identifying the Intention, Impact, and Outcome for each statement.

**▶ Teaching Tip**

The answers to these questions will inevitably generate a list of things that constructive feedback, when given effectively, *should not do*. Take the feedback statement “You are so much better than my other personal assistants.” There are many possible reasons why the consumer might say this, including: to enhance the PA’s feelings of confidence; to gain alliance with the PA; to cause conflict between this PA and the other PAs, and so on. It may make the PA feel superior, uncomfortable, perfect or good. There could be greater consequences, too: the PA may tell the other PAs what the consumer said and this could cause conflict and hurt feelings. During this activity, the instructor wants to draw out both the positive and negative effects this feedback may have on the consumer/PA relationship, quality of care, and other relationships within the household.

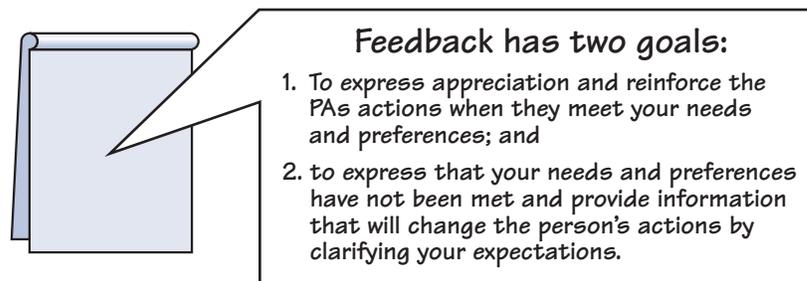
**Discussion (15 minutes)**

6. After recording the Intention, Impact, and Outcome for each statement, refer to your list of intentions and ask the group to identify which intentions are “good” or “valid.” Circle these.
7. Next, have the group identify the impacts that are positive and productive in getting the personal assistant services the consumer need needs or desires. Circle these.
8. Lastly, have the group identify the outcomes that are desirable. Circle these.

**▶ Teaching Tip**

You will see that are very few desirable outcomes and making a note of this is important.

9. Referring to the prepared flip chart, review the definition of feedback:



**Feedback has two goals:**

1. To express appreciation and reinforce the PAs actions when they meet your needs and preferences; and
2. to express that your needs and preferences have not been met and provide information that will change the person's actions by clarifying your expectations.

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## Module 7: Supervisory Skills II

Activity 7.4, continued

**10.** Ask participants:

*Knowing now that a few misspoken words can have such undesirable outcomes, how do we give feedback that will have the impact and outcomes we desire, and meet our intentions?*

**11.** Distribute Handout 53, “Simple Rules for Giving Feedback,” and review.

### **Pairs Work (10 minutes)**

**12.** Distribute Handout 54, “Addendum to Feedback Foibles,” that has the specific behavior that needs to be repeated or changed. Have participants work in pairs (or you can continue to work as a large group if that is the option you choose) to identify which feedback guidelines the original feedback statements broke. Assign one or two statements to each pair.

**13.** As time allows, have pairs report out their work and discuss.

**14.** Ask participants what is the biggest lesson they will take away from this exercise. Encourage everyone to keep practicing—as it takes time to learn these and all the skills we’ve been covering.

*—Teaching Notes—*

## Activity 7.5 Closing

20 minutes (plus celebration time)

### Learning Outcome

By the end of this activity, participants will be able to:

*Identify at least one thing they learned in this session that they will use when they begin supervising.*

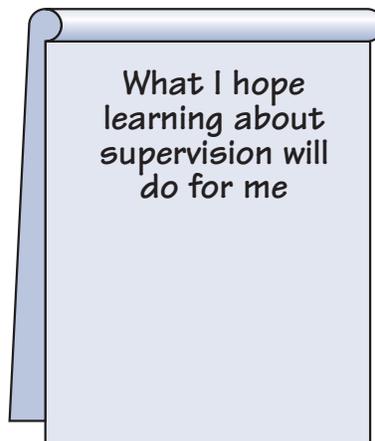
### Key Content

- Providing closure and determining next steps to the training series is essential for group development and planning. As the final session of the workshop series, this closing has two purposes:
  - **Closing for the day's session:** This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group. In addition, the end of day wrap up allows participants to share what they learned—subsequently providing an informal evaluation for the instructor to know what parts of the training were most useful.
  - **Closing for the workshop series:** The closing provides a time and space for participants to identify overall learnings, establish next steps (how they will use the material), ask any final questions, give comments, and share thoughts on their experience to date. As the design of the material allowed for much interaction and community building, closing the series in a celebratory way is essential to honoring the relationships formed and work done together.

### Activity Steps

#### Discussion

1. Explain that this is the end of the second session on Supervising Personal Assistants. It's a time to reflect on what participants learned and how that learning can be applied to their personal situations. Bring out the list of "hopes" that people listed in Module 6.



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## Module 7: Supervisory Skills II

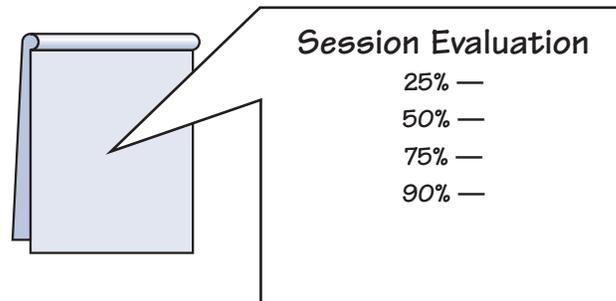
Activity 7.5, continued

2. Ask participants to think about their current and future supervisory endeavors:

*Looking at the list of hopes you expressed originally, how have your hopes been addressed?*

*What is the most important thing you learned today and how will you apply it to your own situation?*

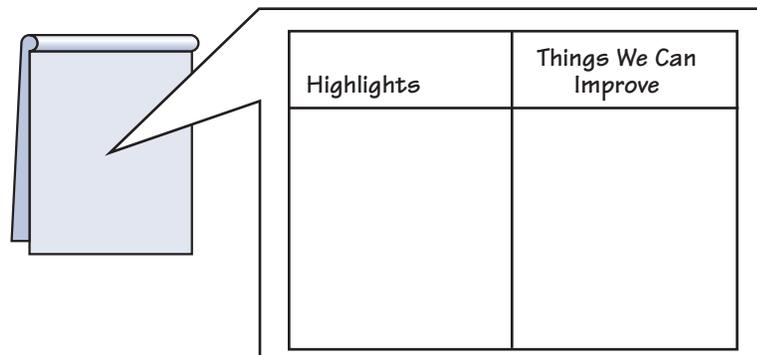
3. Conduct a quick evaluation by asking participants, “How much of today’s session was a good use of your time?” Invite them to vote for the percentages you have listed on the prepared flip chart.



**Session Evaluation**

- 25% —
- 50% —
- 75% —
- 90% —

After they’ve voted and you’ve recorded the responses (praising those who give lower ranking for their honesty), ask them to tell you what worked really well for them—the highlights, and what they think could be better—the ‘low-lights.’ Record ALL answers on the flip chart.



Highlights	Things We Can Improve

Thank participants who give you critical feedback and emphasize that it will help you make future sessions better for participants.

4. Close the workshop series by asking participants to share one or more of the following:

- Something they are taking away from the workshop series.
- A "thank you" to a particular participant who has made the series meaningful for them.
- At least one way they will use the information and knowledge gained in the series in the future.
- Something they will miss about the group or the training.

5. If agreed to ahead of time, distribute contact information of participants, so people can stay in touch with each other.

6. Celebrate the end of the workshop series.

► **Teaching Tip**

A celebration could include any of the following ideas:

- Invite individuals (beforehand) to share a special talent (song, dance, speech) to commemorate the series
- Have a party with sparkling cider, cake, music, etc...
- Allow time for networking and socializing, time for people to exchange phone numbers and plans
- Purchase and distribute small gifts for participants.
- Write individual notes to participants (make sure that if you write for one, you write for all.)
- Create and give out graduation certificates; consider including: participant names, instructor names, dates, accomplishments, number of hours in the training series, name of the series, location, etc.

*—Teaching Notes—*

*–Teaching Notes–*

# **EMPLOYING, SUPPORTING, AND RETAINING YOUR PERSONAL ASSISTANTS**

## **A Workshop Series for People with Disabilities**

### **Handouts**

#### **Workshop III: Module 7**

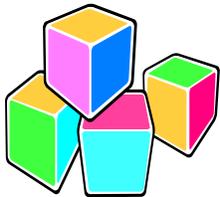
#### **Supervisory Skills II: Self-Awareness, Self- Management, and Constructive Feedback**

# Blocks to Listening

Listening is the most fundamental communication skill- but doing it well is very difficult. Listening fully and actively takes an enormous amount of energy and effort, which we do not often have. Because we know it is important to communication and relationship, most of us have developed very effective ways to look like we are listening when we really aren't- this is called pseudo listening.

But what happens, where do our minds go, when we start to pseudo listen? What BLOCKS us from listening with our full attention?

Below, you will find the *most common* BLOCKS to listening- that either stops listening or prevent us from listening. Everyone has blocks to listening and does pseudo listening at times. It becomes a problem when it is important to be listening actively, for example, when we are supervising.



## Rehearsing

Rehearsing is practicing (in your head) what you are going to say while someone else is speaking. We start rehearsing when we have a point to make or something important to share/say.

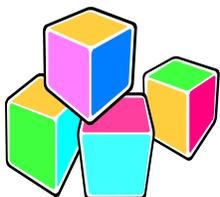
*Example: Yesterday you and your PA had an argument, and while she was apologizing and telling you what was going on for her, you stop listening and start rehearsing in your head how you are going to tell her that she is fired.*



## Mind Reading

When we mind read we are trying to figure out what the person is really thinking or feeling. Mind readers make assumptions about what people *really* mean and are saying, usually based on body language and other non-verbal cues.

*Example: During your shower, the PA is telling you a story about her children. Instead of looking at what she is washing at the moment, she continues to look at the wall. You stop listening to her story and begin mind reading, thinking that she is uncomfortable looking at you and doesn't care about really getting you clean.*

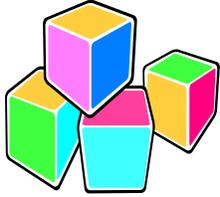


## Filtering

Filtering is listening to some things, but not the whole story. You pay attention enough only to hear what you feel you need to hear. Sometimes people filter to avoid hearing certain unpleasant, negative or critical things, or things that they don't find particularly interesting.

*Example: Your PA comes home from running errands and starts telling you about the heat outside, the lady selling kittens in the street, the cleaner losing your favorite shirt, and the car needing an oil change. Once you heard that the cleaner 'lost your favorite*

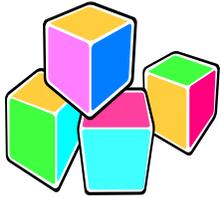
*shirt' you filtered out everything else and stopped listening to the story, and interrupted- asking your PA a series of questions about the shirt and the cleaner.*



### **Dreaming**

Dreaming is also commonly referred to as 'day dreaming.' Usually you are listening and something the person says or does triggers a chain of private thoughts. You are prone to dreaming when you are bored or anxious.

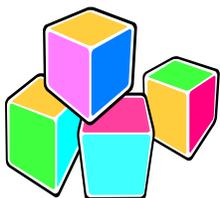
*Example: If the person talking to you is starting to bore you and then starts talking about how excited she is about the weekend, you may start dreaming about your own weekend plans- what you will be doing, who you will be seeing, where you will be going, what you still need to get done by the end of the day.*



### **Identifying**

This happens when what the person says reminds you of your own experience and you stop listening to them and start thinking about what happened to you. Oftentimes you will interrupt the conversation to talk about your own experience. Identifying may also trigger a "too close to the bone" response and listening becomes very difficult because the subject matter is too emotionally charged for you.

*Example: A person begins sharing how she had a terrible experience with a particular PA; you identify and can't wait for her to stop talking so you can talk about the nightmare PA from hell who refused to use soap when washing the dishes. At the time you start identifying you miss the rest of her story and may even jump into rehearsing.*



### **Advising**

Before the person talking has really gotten to what is troubling them, you jump in with suggestions on how to solve the problem. Instead of listening fully, you are thinking about what to do to fix the problem or giving advice or suggestions.

*Example: You are in a bad mood and just don't feel like talking. Your sister calls and starts talking incessantly about how her husband won't help with the housekeeping. Instead of listening to the full story- you start advising by suggesting things she can do with him to calm him down.*

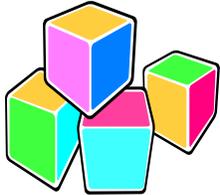


### **Sparring**

Sparring is a verbal block to listening (it happens out loud). When you spar you are very quick to disagree. It often happens when you have strong opinions on the matter. When you begin sparring and stop listening, the situation becomes emotionally charged. A sub-type of

sparring is the put-down when a person uses a sarcastic remark to dismiss the other person's point of view. Another is *discounting*- meaning you quickly dismiss a compliment or positive feedback by running yourself down.

*Example (discounting): You've just finished knitting a sweater and ask your PA to wash it so it shrinks a bit. The PA, says to you, "This is beautiful, you have a lot of talent!" You spar back and say "it's nothing; I don't have talent, it's just knitting."*



### Placating

When you placate, you are nice, pleasant and supportive, but you aren't really listening to what is being shared. Generally, you agree with what is being said without really taking it in. In this mode you may be *patronizing*. It is a block often used with child, people with disabilities and the elderly. Often we placate when we don't have the time/energy to listen fully or don't have an "answer" or suggestion to what the person is talking about.

*Example: You've just finished writing out the list for grocery shopping, and start sharing with your PA what brands and sizes you need. You begin talking about how specific brands of tomato sauce cause an allergic reaction in you and the PA placates by saying, "Don't worry about all of that, I'll take care of you. You're getting all stressed out over nothing."*

What STOPS you for Listening fully?

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What are your BLOCKS to LISTENING?

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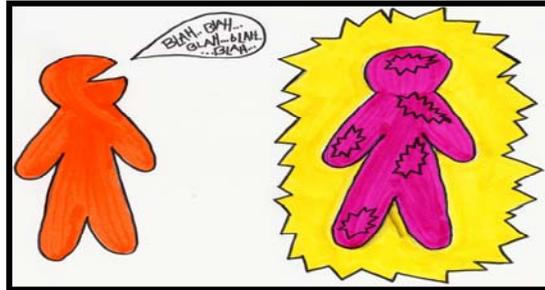
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# Pulling Back

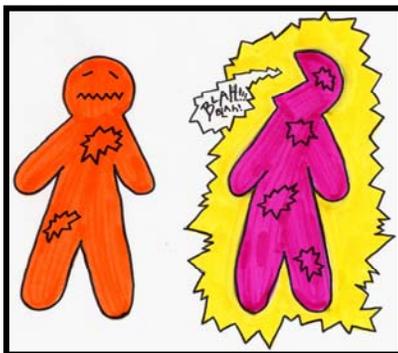
Oftentimes we are faced with situations and people who provoke an emotional response in us— be it **anger**, **hurt**, **frustration**, **hopelessness**, or **sadness**. When we are in an emotional state listening becomes difficult and communication often becomes charged. Whatever our reaction, we have a **CHOICE** in how we respond:



## Choice Point

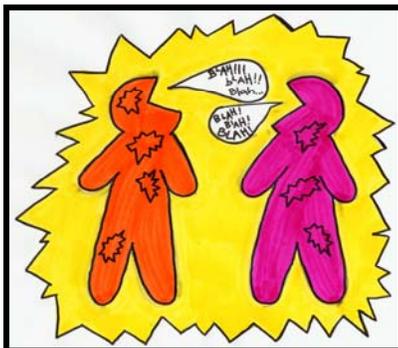
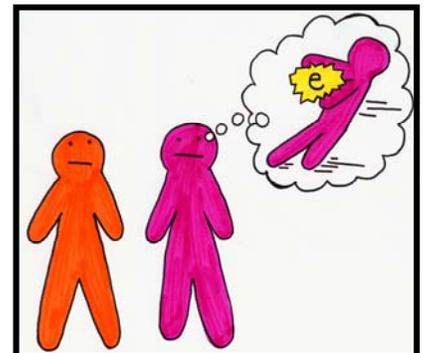
### Option A

### Option B



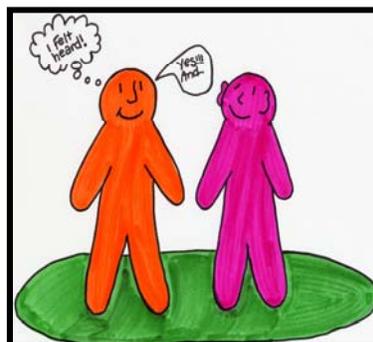
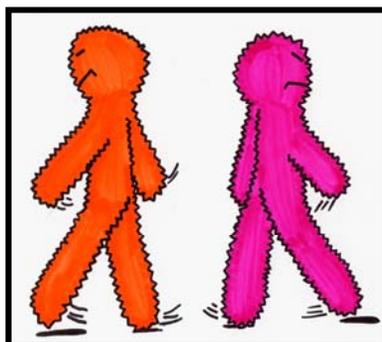
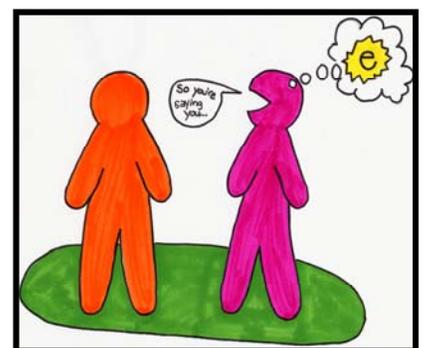
Defend our opinions  
Prepare our response

Suspend our opinions and put them on hold  
Listen actively, without blocks or judgment



Look for evidence to support our opinions  
Discount evidence to the contrary

Look with curiosity for new information or insights  
Stay open to being changed



# Choosing to Pull Back – Which Option?

<b>Option A</b> generally leads to:	<b>Option B</b> generally leads to:
<ul style="list-style-type: none"><li>■ Difficulty thinking clearly</li><li>■ Inability to listen</li><li>■ Difficulty in being open to believing or trusting the other person</li><li>■ Being judgmental</li><li>■ Feeling justified or self-righteous</li><li>■ Blaming the other person</li><li>■ Holding onto anger, resentment, mistrust</li><li>■ Self-fulfilling prophecy—in the future, the person will most likely act in the negative way we expect.</li></ul>	<ul style="list-style-type: none"><li>■ Clear thinking</li><li>■ More appropriate communication</li><li>■ More empathy for those who think, see, and believe differently</li><li>■ Nonjudgmental responses</li><li>■ Having <i>more</i> information, and therefore a better understanding of the whole situation</li><li>■ Defusing anger</li><li>■ Building trust</li><li>■ Problem-solving that involves both parties, resulting in mutual ownership of the solution</li><li>■ Self-fulfilling prophecy—in the future, the person will most likely act in the positive way we expect.</li></ul>

# Simple Rules for Giving Feedback

When you want to praise someone...

**1. Be specific about what you are giving feedback on...**

For example: "Brenda, I really appreciated that you called the night before to make sure that the van would be here in the morning at 7:00 am to pick me up for my appointment."

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**2. Tell the person how what they are doing makes you feel (its impact on you)...**

For example (add to the last): "*Brenda, I really appreciated that you called the night before to make sure that the van would be here in the morning at 7:00 am to pick me up for my appointment.* Transportation is so frustrating to me and you calling the night before to confirm the time, allowed me to get good night's sleep."

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**3. Give positive feedback often and as close to the time as what they did well happened**

For example, a good time to give the feedback above could be that day or the next.

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## When there's a problem...

1. **Be specific and direct about what you are giving feedback about and tell the person how what the person is doing impacts you...**

For example: Sally, it makes me uncomfortable when you use curse words when you are in my house.

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2. **Use language that does not blame or judge**

(The example above does not blame or judge). An example that is judgmental would be: *Sally, your piggish language makes me sick. Young ladies shouldn't talk like that.*

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3. **Indicate belief in the person and that person's ability to fix the problem**

For example: Sally, it makes me uncomfortable when you use curse words in my house. You are a good person and I really enjoy working with you when you aren't swearing. Some days, you go the whole day without saying a swear word, so I know it's possible to do!

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## After giving the feedback . . .

### 1. LISTEN

Hear the other point of view

Actively listen: Use pull back, paraphrase and open-ended questions

### 2. ENGAGE IN DIALOGUE

Hold a conversation

Listen to each other

### 3. PLAN FOR ACTION

Search for solutions that all can agree to

### 4. ACKNOWLEDGE

Thank the person and acknowledge what you have accomplished together

# Addendum to Feedback Foibles

You're such a peach! I couldn't have asked for a better personal assistant!  
Specific: The PA took her time to show you how to do put on makeup.  
.....

You are so much better than my other Personal Assistants.  
Specific: This PA has a really great talent for cooking authentic, inexpensive Italian food.  
.....

Are you sure you're doing that right?  
Specific: PA is mopping the floor without using soap.  
.....

I know you know how to do this. Just try harder next time.  
Specific: PA is not able to transfer you without making you feel like you are going to fall.  
.....

You are driving me nuts. Get out!  
Specific: PA is talking while you are trying to watch a movie.  
.....

It shouldn't take you that long to do the laundry.  
Specific: The PA was at the Laundromat for 4 hours to do one load of laundry. (This was odd even for her.)  
.....

You have no idea how much that irritates me.  
Specific: PA is calling you "honey" and "baby" instead of referring to you by your name.  
.....

I love your style.  
Specific: PA has a great way of putting outfits together that make you look stylish.