

# SECTION 8

## Managing Your PA

- Being Assertive
- Supervising Others
- Keeping Your PA
- Resolving Conflict
- Evaluating PA Job Performance
- Terminating Employment
- Job Performance Evaluation Forms
- Section 8 Checklist



## Managing Your PA

Directing your own personal assistance (PA) services and managing employees is a job many people find very satisfying. Section 8 - Managing Your PA is a brief look at six management issues. They are:

- Being assertive
- Supervising others
- Keeping your PA
- Resolving conflict
- Evaluating PA job performance
- Terminating employment

Let's begin with being assertive.

### Being Assertive

Supervising your PA is not like any other kind of working relationship. Most other employer/ employee relationships do not involve such personal contact. In order to be a good supervisor and be sure your needs are being met you will have to be assertive. You will have to be comfortable expressing your needs and how you want things done. If you are a shy person, this may not be easy for you, but it is very important.



You might want to try practicing with friends or family members if you think it will help you learn and gain more confidence in being assertive.

How you communicate with your PAs will be a big part of the success you have with them. You may become friends with your PA but it will be important for both of you to remember your roles in the working relationship. You are the supervisor.

Supervising does not mean dictating. Being assertive does not mean being aggressive or pushy. Being assertive means:

- speaking up for yourself,
- explaining your needs and
- directing your PA in a clear, patient way.

Respect and good communication between you and your PA are important and can lead to strong and lasting working relationships.

Below are some suggestions to help you to be more assertive.

- Make sure that your PA knows your expectations.
- Be fair and honest when you are dealing with your PA.
- Have respect for your PA by realizing the role this person has in your life.
- If there is a need to correct how your PA is working, address the issue calmly and as soon after the incident as possible.
- Most important – be direct when giving instructions and repeat yourself if necessary.

If this is an area of interest to you, look for additional information or a course on improving communication skills or building self-esteem.

## **Supervising Others**

Management of your PA has a lot to do with your interpersonal and communication skills (how well you communicate with other people). Talk with and treat your PA as you would like to be treated. Be clear about job duties. Be respectful when giving direction and feedback.

Feedback about performance should be specific. This applies to constructive and positive feedback. Give as much detail as possible when talking to your PA about job duties and performance.

Below are some of the basics of your role as a supervisor.

Create a positive relationship with your PA:

- Show interest in your PA
- Indicate belief (confidence) in your PA
- Explain the rules clearly
- Request that your PA follow work rules
- Explain the consequences of breaking the rules

Ask for and listen to your PA's perspective:

- Identify issues to be addressed

- Ask open-ended questions, for example, “What do you think about....?”
- LISTEN actively (give the other person your full attention, let them know you are listening by responding to what they are saying. For example, listen carefully and then say in your own words what the person said.)
- Acknowledge PA’s perspective
- Practice creative problem-solving
- Listen without letting your emotions get in the way
- Maintain focus on work-related behaviors
- Talk about options
- Ask for ideas, offer suggestions
- Offer information/ask questions about the potential impact of choices
- Think of new options
- Request actions

Identify action steps:

- Set goals and work together
- Follow plan agreed upon

Follow-up:

- Maintain awareness of and follow through on commitments
- Give positive and constructive feedback when appropriate

If this is your first experience with supervising others, you may want to find an experienced supervisor who is willing to listen to your concerns and can offer some tips of the trade. Some people find that it is easier to supervise an employee if some of the typical sticky situations have already been thought out. Things like how many times the employee can be tardy or absent and issues around trading shifts with another personal assistant. Make up your mind about these situations before they happen. Show your PA your decisions in the form of a written list or policy. Take a look in Appendix F for some ideas to get started.

## Keeping Your PA

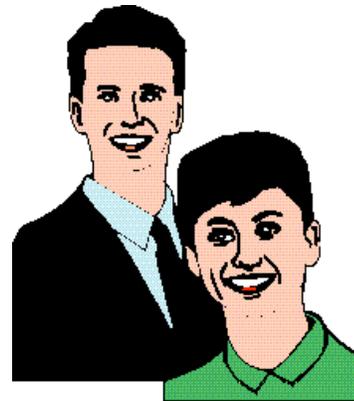
### Communication is the Key

Now that you've recruited, hired and trained your personal assistant, you will want to have a good working relationship. Keeping your newly hired PA will protect the investment of time and money you have made.

Most personal assistants who stay with the job do so because they find it personally rewarding. Good employers create a work environment that brings out the best their PAs have to offer. You will want your PA to be satisfied with his/her work and therefore, be a productive employee. Good communication between you and your PAs can help do this.

Consider these suggestions:

- Treat PAs with kindness, fairness and respect
- Know your own care needs
- Be able to offer both praise and criticism, when appropriate
- Act as independently as possible
- Keep communication open
- Talk over problems as they come up
- Avoid taking your frustrations out on your PA
- Show interest in your PA as a person



To summarize, you, as the employer, have the opportunity to provide a positive work environment for your PA. This, in turn helps him/her to be happy, productive and motivated to work for you. Good communication between the two of you is the key to a good working relationship. A PA who is happy in his/her work will stay with you longer and do a better job, which will benefit both of you.

## Resolving Conflict

Conflicts are often a natural part of establishing and building a relationship. Be prepared to deal with problems as they come up. Remember to manage your emotions so things do not get worse than they should be. Employees will usually respond in a non-threatening and positive way if their employer is fair and consistent.

If you have a conflict over duties, pay, time off, social conduct or use of property, remind your PA of your agreement. If they refuse to comply with the rules, be prepared to have them replaced.

### Solve problems using a step-by-step process

Problem-solving is a process. The same steps can be used for problems involving a broken wheelchair as for interpersonal conflicts (conflicts between people). The guide below is a formal process that involves thinking about solutions and writing down ideas. You may not need to use the whole guide to solve a problem, but it is helpful to be aware of the entire process.

#### **1. Identify the Problem**

This seems simple enough, but sometimes not everyone will agree that there is a problem. It may be a problem for your PA that your family member orders him or her around, but it may not be a problem for you.

#### **2. Define the Problem**

Define the problem without involving personalities, motives, blame and value judgments. Ask open-ended questions and use active listening to get a better understanding and definition of the problem.

Who owns the problem? What this means is, whose responsibility is it to solve this problem? Examples include:

- A broken wheelchair is your problem, but your PA and family could help you solve the problem.
- A PA who bothers you by talking too much is your problem, unless that behavior will lead to the PA losing his/her job. Then the problem belongs to both of you.

- Your PA has lost her childcare and cannot make other arrangements for a week. The problem belongs to both of you.
- Each person involved should have input, but whoever has ownership of the problem should make the final decision.



### **3. Generate Solutions**

Everyone involved should suggest solutions. Do not focus on personalities and do not criticize any suggestions. (Do not say things like: "You shouldn't be so lazy." "You shouldn't be such a jerk.") Write down every solution, no matter what it is.

### **4. Discussion and Evaluation**

Everyone involved should discuss the positives and negatives of each solution suggested. Writing out a list of the pros and cons can help in the evaluation process.

### **5. Select a Solution**

Decide on the solution that will best solve the problem.

### **6. Plan Actions**

Everyone involved should agree on who will do what, where, when, and how to solve the problem.

### **7. Evaluation of Solution**

Set a date and time to discuss whether the solution is working and revise the plan as needed. By facing problems right away, working relationships can be strengthened and improved. Working relationships that use problem solving can keep everyone working as a team and with less stress.

## Discipline – Correcting the action of employees

What is discipline? It can be a way to correct your PA's work. It can be the how you remind your PA of things they are forgetting or the way you warn your PA that a repeated habit or action is becoming a problem. Many employers use a 3-step process called progressive discipline to help employees understand that their work must be improved or corrected.

Progressive discipline is defined as an order of events used to correct the action of employees. Progressive discipline includes:

- First, a verbal warning
- Second, a written warning
- Third, job termination

Consider using the problem-solving process when a problem occurs. You can use the tips below to get started.

- **Schedule an extra appointment** with the PA. Be prepared to pay him/her for this time if necessary.
- Prior to the meeting, **write down your concerns** so that you can organize your thoughts and ensure that you don't forget what you want to address.
- **Discuss** your concerns. Be aware of your emotions and how they affect what you are trying to say. Anger, sarcasm and defensiveness will not help you explain your concerns.
- **Use "I" statements.** This shows that you are taking ownership of your own feelings, and helps the other person understand where you are coming from. For example: "I feel frustrated about your late arrival every day. It makes me anxious because I worry that I won't be on time for work." Avoid blaming, as this will put the PA immediately on the defensive.
- Let the PA have a chance to voice his/her concerns. **Listen actively** and avoid interrupting.
- **Be willing** to examine yourself and your role in the conflict.
- Come to a final agreement about the problem. **Put it in writing** so that each person leaves with the same understanding of the resolution.
- If you find that you are not able to work the problem out on your own, **seek assistance.** A supervised meeting facilitated by an outsider may be helpful in resolving the conflict.

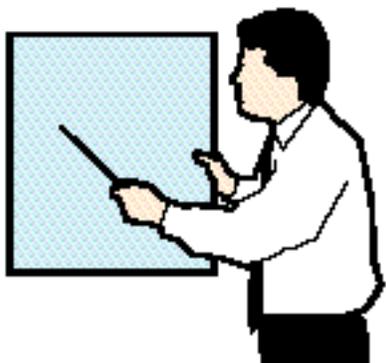
If the idea of conflict resolution is a source of concern for you consider seeking training that addresses the broader topic of communication and relationship building. Perhaps you can find a mentor who has had these experiences and is willing to share their expertise.

## Evaluating PA Job Performance

In addition to providing your PA with regular, positive, constructive feedback, it is important to formally review their job performance at least once a year. Some people suggest that a job performance review at 6 months of employment allows you the opportunity to make some adjustments as needed. Then review again at the PA's one-year anniversary of employment and yearly thereafter. Performance evaluations are a good way to keep you both on track when it comes to defining roles and responsibilities of the working relationship. It is up to you to choose when and how often to evaluate your PA's job performance.

To evaluate your PA's job performance compare your PA's actual work to the list of job duties you both agreed to when you both signed the job description.

In addition, you can:



- Review your PA's performance at the time designated for his or her evaluation; include the positive as well as areas of improvement.
- Go over the job description again and review your expectations for the PA.
- Allow the PA an opportunity to explain his or her performance.
- Evaluate the performance in writing and give a copy to your PA.

Be honest with your PA about his/her work and, if needed, give clear instruction for improvement. It's a good idea to be clear with your PA that the performance evaluation is a way for you both to work toward improved job performance, not an entitlement for a raise in pay.

Sample Job Performance Evaluation forms are included at the end of this section. You may use the forms provided or use them as a guide to create your own

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## Terminating Employment

Terminating employment with your PA may be hard for you. It is almost never easy to fire someone. The PA may be a nice person who is just not meeting your needs. Your PA may work out for someone else or in another type of job. If there are parts of the job that s/he does well, you could offer to write a letter of reference highlighting those skills.

If it is your choice to terminate your PA's employment, you should do some advance planning if possible. You may want to have another person with you if you think the PA might be angry and you would be at risk, or dismiss him/her over the phone if possible. Have a back-up PA ready to start in case your PA gets upset and quits right away. (For some ideas about planning for back-up PAs, see Section 9.)

If your PA is just not working out (for example, personality conflicts, scheduling difficulties), you should consider giving a two-week notice if you are certain that will not put you in a risky or uncomfortable situation. This gives both you and your PA time to plan.

If your PA quits and gives notice, you should have time to find another assistant. If you are using a provider agency you can call them for help. Planning ahead of time will save you time and effort during the termination process.

You should terminate employment immediately if your PA has:

- Stolen something from you
- Been abusive physically or mentally
- Severely violated your agreement

Any actions that are against the law should also be reported to the police.

No matter how the situation arises, you will be best able to handle it if you have a step-by-step process already in place. If you have to terminate your PA's employment:

- Notify your payroll agent immediately.
- Keep written records of the event(s) and reasons for termination. This will protect you in case of a later dispute. Be careful about what you write, record the facts.

- Keep employment records for a while. Most people suggest three years.
- Have your keys and any other items that belong to you returned.

Firing doesn't just happen. With planning you can have the step-by-step process in place to handle this kind of situation yourself. Remember to talk it over with someone you trust. Sometimes just saying out loud what you're thinking helps make the decision more apparent. When you have a plan, you'll have covered all the bases, understand why you need to document your decision and who needs to know if you fire your PA. Remember you always need to let your payroll agent know.

## Job Performance Evaluation

Job Title:

Personal Assistant

PA:

\_\_\_\_\_

Employer

\_\_\_\_\_

Employer: Check the box that best describes job performance in all relevant tasks using the legend below:

**0=Unacceptable**

**1=Fair**

**2=Good**

**3=Excellent**

PERSONAL CARE					DOMESTIC/HOUSEHOLD				
0	1	2	3		0	1	2	3	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bathing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grocery Shopping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shaving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Personal Shopping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dressing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Meal Preparation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Oral Hygiene	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Eating
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Transferring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Laundry
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sleep Schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cleaning/Housekeeping
HEALTH & SAFETY					COMMUNITY				
0	1	2	3		0	1	2	3	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Banking
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PT/OT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Leisure
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Home Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Community Access
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Religious Activities
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Transportation

**Overall Rating of Employee's Behavior and Performance:**

0
  1
 2
 3

Employer Comments and Suggestions:

We have both reviewed and discussed the above job performance ratings:

Employer Signature	PA Signature
Date	Date

## Job Performance Evaluation – PA Feedback

PA: Check the box that best describes job performance in all relevant areas from the employer’s rating using the legend below:

**1=Do Not Agree**

**2= Partially Agree**

**3=Agree**

PERSONAL CARE				DOMESTIC/HOUSEHOLD			
1	2	3		1	2	3	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bathing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grocery Shopping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shaving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Personal Shopping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dressing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Meal Preparation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Oral Hygiene	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Eating
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Transferring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Laundry
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sleep Schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cleaning/Housekeeping

HEALTH & SAFETY				COMMUNITY			
1	2	3		1	2	3	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Banking
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PT/OT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Leisure
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Home Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Community Access
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Religious Activities
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Transportation

**PA Comments:**

Please write your comments and sign below agreeing that you have reviewed your job performance with your employer.

Note: Providing your signature is not an admission of agreeing or disagreeing with the job performance ratings given by employer.


\_\_\_\_\_  
PA Signature

\_\_\_\_\_  
Date

## Job Performance Evaluation

**Job Title:** Personal Assistant

**PA:** \_\_\_\_\_

**Employer:** \_\_\_\_\_

Employer: Check the box that best describes job performance using the legend below:

**0=Unacceptable                      1=Fair                      2=Good                      3=Excellent**

PERSONAL CARE				DOMESTIC/HOUSEHOLD			
0	1	2	3	0	1	2	3
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

HEALTH & SAFETY				COMMUNITY			
0	1	2	3	0	1	2	3
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

**Overall Rating of PA's Behavior and Performance:**

Employer Comments and Suggestions:

We have both reviewed and discussed the above job performance ratings:

Employer Signature	Date	PA Signature	Date
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## Job Performance Evaluation – PA Feedback

PA: Check the box that best describes job performance in all relevant areas from the employer’s rating using the legend below:

**1=Do Not Agree**

**2= Partially Agree**

**3=Agree**

### PERSONAL CARE

### DOMESTIC/HOUSEHOLD

1	2	3		1	2	3	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

### HEALTH & SAFETY

### COMMUNITY

1	2	3		1	2	3	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

**PA Comments:**

Please write your comments and sign below agreeing that you have reviewed your job performance with your employer.

Note: Providing your signature is not an admission of agreeing or disagreeing with the job performance ratings given by employer.


\_\_\_\_\_  
PA Signature

\_\_\_\_\_  
Date

## PA Job Performance Evaluation

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Evaluate:  After Training  3 Months  6 Months  Yearly

### A. Paperwork/schedule

1. Are all time sheets signed correctly?
2. Does the employee arrive when scheduled?
3. Does the employee call ASAP if there is a schedule conflict?
4. Has the employee called in sick? If so, how many days?
5. Does the employee leave on time?

Comments:

### B. Home use:

1. Does the employee follow rules concerning:  
phone  
car  
computer  
TV  
Other electronic devices (games, VCR, etc.)  
Kitchen privileges (foods/snacks)
2. Does the employee follow rules concerning visitors (friends/family)?
3. Does the employee show respect for the home?
4. Does the employee know the emergency plan (exits, phone numbers, etc.)?

Comments:

C. Schedule activities/social program/ medical care/ personal care

1. Does the employee follow the schedule?
2. Does the employee take an active role in participation of social program?
3. Does the employee understand the behavior plan and follow through?
4. Does the employee show interest in encouraging social language?
5. Does the employee understand medical needs of the employer and follow up care (including medical devices)?
6. Does the employee follow the personal hygiene program?

Comments:

General comments of this employee:

Any concerns or need for retraining:

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Prepared by:

Date:

PA comments:

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PA signature:

Date:

**A Calendar Can Be Used As a PA schedule**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 Jill: 6-8 am	2 Kim: 5-10 pm	3 Jill: 6-8 am	4 Kim: 5-10 pm	5 Jill: 6-8 am	6 Kim: 5-10 pm
7 Jill: 9-11 am	8 Jill: 6-8 am	9 Kim: 5-10 pm	10 Jill: 6-8 am	11 Kim: 5-10 pm	12 Jill: 6-8 am	13 Kim: 5-10 pm
14 Jill: 9-11 am	15 Jill: 6-8 am	16 Kim: 5-10 pm	17 Jill: 6-8 am	18 Kim: 5-10 pm	19 Jill: 6-8 am	20 Kim: 5-10 pm
21 Jill: 9-11 am	22 Jill: 6-8 am	23 Kim: 5-10 pm	24 Jill: 6-8 am	25 Kim: 5-10 pm	26 Jill: 6-8 am	27 Kim: 5-10 pm
28 Jill: 9-11 am	29 Jill: 6-8 am	30 Kim: 5-10 pm	31 Jill: 6-8 am			

## Section 8 Checklist

Section 8 – Managing Your PA Checklist	
Check here	
	I understand that being assertive means being direct, giving clear instructions and repeating myself if necessary.
	I read about supervising others.
	I understand that good communication between my PA and me is important for a good working relationship.
	I read the steps to the problem-solving process.
	I understand that evaluating my PA's job performance is a way for both of us to work toward improved job performance.
	I read the information about terminating employment.
	I looked over the job performance evaluation forms.
	I have enough information to begin managing my PA.



