

EMPLOYING, SUPPORTING AND RETAINING YOUR PERSONAL ASSISTANT

Facilitator Overheads and Participant Handouts¹ For Modules 1-6

¹ This packet contains both **facilitator overheads** and **participant handouts**. The notation on the bottom left hand side of each page will indicate its purpose, title, module and activity.

Module 1

Facilitator Overheads and
Participant Handouts

EMPLOYING, SUPPORTING, AND RETAINING YOUR PERSONAL ASSISTANT

An Orientation Workshop for Consumers Living with Disabilities

Goal:

As a result of completing this workshop, participants will be more effective in finding, supporting, and supervising personal assistance staff, resulting in more success in retaining such staff.

Objectives:

By the time participants complete this workshop, they will be able to:

- Describe the consumer-directed service model and the rights and responsibilities that go with consumer-directed services.
- Identify their personal care needs and preferences.
- Place ads, screen, interview, and hire personal assistants who can best match and support their needs and preferences
- Communicate better, including listening, asking open-ended questions, and paraphrasing.
- More effectively manage difficult conversations and situations, applying communication skills.

Agencies have to coordinate the services people with disabilities need to help them live the life they prefer and make sure they are safe.



Consumer-Direction	
Advantages	Disadvantages


Advantages and Disadvantages of Two Personal Care Models


SUMMARY GRID

[illegible]


SAMPLE: Agency Model takes on the Consumer-Directed Model


Some Key Differences

	Routine Function/ Concern	Agency Model	Consumer- Directed Model
		<i>Responsibility falls on:</i> <small>*In CD model, "agency" means the party responsible for program oversight and/or the fiscal intermediary</small>	
RECRUITMENT	Advertise and Recruit Aides (including costs)	Agency	You
	Screen applications and interview candidates	Agency	You
	Check employment references	Agency	You
	Hires Personal Assistants	Agency	You
	Calculate Pay/ Salary/ Benefits	<i>The overseeing government agency (e.g. Human Resource Administration) generally decides this</i>	
	Ensure PA paperwork is submitted and in order	Agency	You
MANAGING SERVICES	Submit and review PA timesheets	Agency	You
	Schedule PA's	Agency (sometimes consumer can give pref.)	You
	Establishes, implements and manages backup and replacement system when a scheduled PA cannot work/ is on vacation	Agency	You
	Maintain accurate records on PA's; Report changes	Agency	You (submit to agency*)

	Routine Function/ Concern	Agency Model	Consumer- Directed Model
		Responsibility falls on:	
FISCAL & LEGAL	Coordinate all matters involved in the PA's taxes and benefits	Agency	Agency
	Cover PA work-related injuries or illnesses under the terms and conditions of the Worker's Compensation Policy	Agency	Agency
	Pay Personal Assistants based on timesheets Consumer submits		Agency
	Ensures PA has annual TB test and physical exam	Agency	You
SUPERVIS ING	Determines which duties PA will/ will not perform	Agency Policy	You and the PA
	Supervise PA's regularly	Agency	You
	Determining training needs	Agency	You
	Provide feedback, evaluation, praise	Agency and you (at times)	You
	Fire undesirable PA's	Agency	You
Other Program Specific Responsibilities:			

Agency Model takes on the Consumer-Directed Model -- Some Key Differences

	Routine Function/ Concern	Agency Model	Consumer- Directed Model
		<i>Responsibility falls on:</i> <i>*In CD model, "agency" means the party responsible for program oversight and/or the fiscal intermediary</i>	
RECRUITMENT	Advertise and Recruit Aides (including costs)		
	Screen applications and interview candidates		
	Check employment references		
	Hires Personal Assistants		
	Calculate Pay/ Salary/ Benefits		
	Ensure PA paperwork is submitted and in order		
MANAGING SERVICES	Submit and review PA timesheets		
	Schedule PA's		
	Establishes, implements and manages backup and replacement system when a scheduled PA cannot work/ is on vacation		
	Maintain accurate records on PA's; Report changes		

	Routine Function/ Concern	Agency Model	Consumer- Directed Model
		Responsibility falls on:	
FISCAL & LEGAL	Coordinate all matters involved in the PA's taxes and benefits		
	Cover PA work-related injuries or illnesses under the terms and conditions of the Worker's Compensation Policy		
	Pay Personal Assistants based on timesheets Consumer submits		
	Ensures PA has annual TB test and physical exam		
SUPERVIS ING	Determines which duties PA will/ will not perform		
	Supervise PA's regularly		
	Determining training needs		
	Provide feedback, evaluation, praise		
	Fire undesirable PA's		
Other Program Specific Responsibilities:			

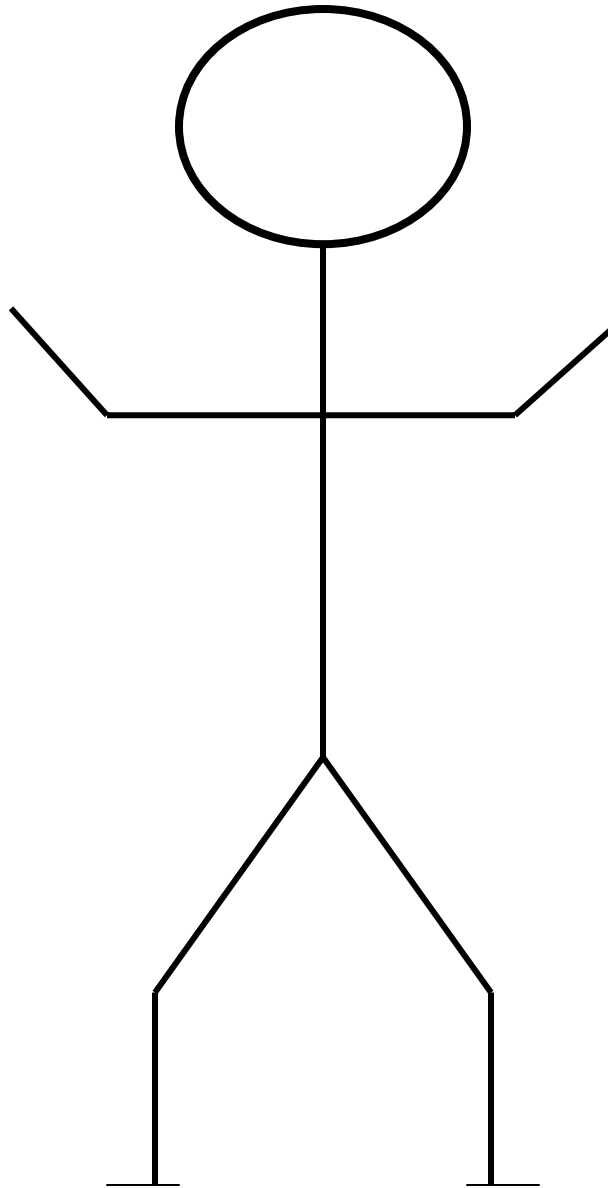
Module 2

Facilitator Overheads and Participant Handouts


Agencies that
regulate Personal
Assistant Services know
best
what type of training,
education and experience
a
Personal Assistant needs
to do a
good job.



My Ideal PA



Personal Care Planning List

	Needs:	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):
		A D L ' S	Bathing/Showering		
Dressing					
Grooming (Shaving, hair care, Make-up, oral care)					
Meal Preparation					
Eating					
Bowel Care					
Bladder Care					
Turning in Bed					
Transferring					
Exercising					
Other:					

		TOTAL:			
I A D L ' S	Writing Letters/Mail				
	Grocery Shopping				
	Computer Assistance				
	Making Bed				
	Driving (Van?)				
	Errands				
	Laundry/ Ironing				
	Housekeeping				
	Answer Phone				
	Child Care				
	Pet Care				
	Reading				
	Others:				
	M E D I C A L		How Often (days a week/ times a day)?	How long does it take?	Preference of time of day (am/pm):
Needs:					
Pressure Relief/ Positioning					
Medications					
Range of Motion					
Skin Care/ Inspection					
Suctioning/ Resp. Care					
Wound Care					
Diabetes Care					
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
ABOUT MY IDEAL PERSONAL ASSISTANT:	Male			
	Female			
	Younger			
	Older			
	Non-smoker			
	Non-drinker			
	Night Person			
	Morning Person			
	Physically Strong			
	Religious/ Spiritual			
	Social			
	Talkative			
	Quiet			
	Sense of Humor			
	Driver			
	Others:			

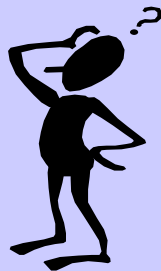
TALENTS AND SKILLS OF MY IDEAL PERSONAL ASSISTANT	Skill	Very Important to Me	Somewhat Important to Me	I'm flexible/ It Doesn't Matter
	Read			
	Write/Type			
	Good Cook (my style of food)			
	Computer Literate			
	Good with Money Mgt.			
	Signs (ASL)			
	Wheelchair Cleaning			
	Gardening/ Plant Care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

Additional Personal Information

To help identify other needs and preferences:

	Preference Now or in the Future:	All the time	Sometimes	Never
	OTHER PERSONAL QUESTIONS TO CONSIDER:	I like to go out and socialize		
I drink alcohol and I may ask PA to purchase for me				
I do illegal drugs				
I smoke cigarettes				
I have a job				
I volunteer				
I participate in activities outside the home				
I love to party and I like to entertain				
I go to school				
I want my PA to eat meals with me				
Others:				

Completing my
"Mapping Out my
Comfort Zone" and
personal care list
forms is good- but
they won't get me
much better service.





A Snapshot of Me

Daily I would need:

Notes:

**A Couple times a week (or as specified)
I would need:**

Notes:

Weekly I need:

Notes:

My Most Important Personal Preferences:



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

Braiding 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 cats 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- 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 ol' 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.

(SAMPLE)
CONSUMER/PERSONAL ASSISTANT
WORK AGREEMENT

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:							

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.

(Personal Assistant): Initial below appropriate agreements between (employer name) and (personal assistant):

_____ 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 Care Planning List):

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

Module 3

Facilitator Overheads and
Participant Handouts

The best way to
find a good
personal assistant is
through a good
friend or family
member.



ESSENTIAL ELEMENTS OF A COMPLETE INTERVIEW PROCESS

- ◆ Advertising and Screening
- ◆ In-Person Interview and Assessment
- ◆ Reference Checking Process
- ◆ Making the Offer
- ◆ Contacting Candidates
(not offered the position)

FINDING PERSONAL ASSISTANTS

▣ Key Objectives ▣

- ♦ Be constantly aware of your needs and preferences, AND express clearly your needs and preferences to each candidate
- ♦ Get closest to the 'right match' possible given the candidates who apply for the position
- ♦ Be conscious of what 'trade-offs/compromises' are necessary to make in order to fulfill staff needs AND TO IDENTIFY THE SUPPORT/ DEVELOPMENT NEEDS for staff you choose to hire



Finding Personal Assistants



LOOK WITHIN YOUR OWN COMMUNITY AND SOCIAL NETWORK

FRIENDS, FAMILY, PEERS, CURRENT PA'S MAY HAVE THE BEST ADVICE IN FINDING SOMEONE WHO WILL BE ABLE TO FILL YOUR NEEDS. ASK THEM TO PUT THE WORD OUT.



NEWSLETTERS AND LEADERS OF GROUPS YOU BELONG TO.

E.G.- CHURCHES AND SYNAGOGUES OFTEN HAVE WEEKLY BULLETINS THAT MAKE ANNOUNCEMENTS FOR MEMBERS. TRUSTED GROUP LEADERS MAY KNOW "GOOD PEOPLE" TO REFER.



NEWSPAPER ADVERTISEMENT:

THINK LOCAL! AN ATTRACTIVE PART OF A JOB, ATTRACTIVE QUALITY OF A PA IS THAT TRANSPORTATION TO/FROM YOU IS NOT AN ISSUE. IS THERE A LOCAL COLLEGE NEWSPAPER TO PLACE AN AD IN? IS THERE A TOWN NEWSPAPER?



INDEPENDENT LIVING CENTERS; AREA AGENCIES ON AGING

THEY OFTEN HAVE REGISTRIES OR LISTS OF WORKERS WHO MAY BE ABLE TO WORK FOR YOU.



COMMUNITY/LOCAL COLLEGE OR UNIVERSITIES

THEY MAY HAVE CAREER CENTERS THAT ALLOW PEOPLE TO PLACE ADS- WHY NOT GIVE THAT A TRY? ESP. ONES THAT HAVE NURSING OR OTHER HEALTH CARE PROGRAMS.



HOSPITALS/ MEDICAL CENTERS / NURSING HOMES

DOES SOMEONE YOU KNOW (OR CAN YOU) PLACE AN AD ON THE BULLETIN BOARD IN THE BREAK ROOM- IN HOPES OF ATTRACTING SOMEONE WHO IS LOOKING FOR SOME EXTRA HOURS?



REGISTRIES AND HOTLINES

Creating an Ad

WHAT TO INCLUDE IN AN ADVERTISEMENT:

Things that make the job appealing

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

Important information to include:

- Hours of work
- Pay
- General location (Don't give out home address!)
- Phone number to call

An advertisement for me might look like:

Samples

Personal Assistant Needed

NO TRAINING NEEDED; 8.50\$ 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-XXX-XXXX

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 NON-SMOKER WHO LIKES CATS; CALL MICHELLE- LEAVE MESSAGE XXX-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.

Need someone 40 hours/wk F/T work with health insurance and other benefits. Personal assistant needed to help with dressing, bathing, laundry, housekeeping. 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 for

weekends. 8\$ hour/ 8 hours. Assist older but 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. DeGraff received a number of responses on his answering machine. As you read the responses, think about which ones you would consider calling back (if any), and which ones you wouldn't (if any), and why. Circle your answer. Of those you give a "yes" to, rank them in order of preference, starting with #1 as your first preference.

\$9 for Help to 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.

- (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, I’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

IN-PERSON INTERVIEWS



KEY OBJECTIVES

Show candidate that this is a situation
s/he would like to work in



Give candidate a general
sense of what job will be



Start the relationship
building process



Get a sense about the candidate
as a worker and person

STRUCTURING YOUR INTERVIEW PROCESS

Key Questions – The Three W's

WHO (consumer alone, with someone else, with current PA?)

WHERE (consumer's home, other place?)

WHAT (candidate skills, attitudes, personal qualities, work experience and training, other?)

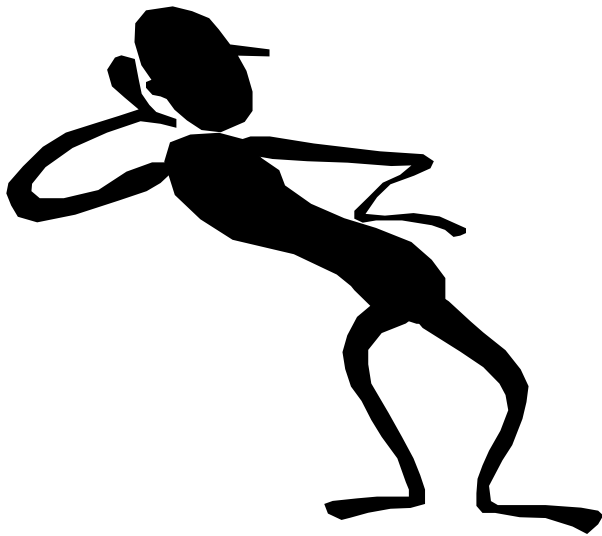
Number of steps in process (pre-screen, individual only, pre-screen and individual, other?) also needs to be determined

CHECKING REFERENCES

Decision: All Candidates? Bring To Interview or You Contact Only Serious Candidates?

Common Reference Check Categories

- ♦ Verify previous jobs
- ♦ Level of responsibility/skill/experience in previous jobs
- ♦ Reliability (attendance and punctuality)
- ♦ Overall personality/qualities
- ♦ Would you hire person again
- ♦ Suggestions for supporting individual in job



REAL Listening

Based on the INTENTION to do one of four things:

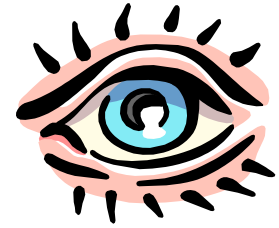
- Understand person
- Enjoy person
- Learn Something
- Give Help or Solace (Empathy/Sympathy)

ACTIVE LISTENING

- ❖ Good listening is essential to clear, effective communication, and is of primary importance in intermediary supervision.
- ❖ “Body language” refers to the way people communicate non-verbally, through postures, facial expressions, gestures, and movement. Body language often communicates more clearly than words. Since people often respond to our body language rather than to our words, we must become more aware of our body language and learn to control it.
- ❖ *Active* listening, i.e., listening with full attention to the other person -- including attentive body language -- is the underlying skill in intermediary supervision for the following reasons:
 - Being listened to attentively feels caring and helpful to the speaker. Not being listened to, or being listened to in an inattentive manner, feels hurtful and unhelpful.
 - 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.



CLOSED -VS.- OPEN ENDED QUESTIONS



Some Examples:

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?

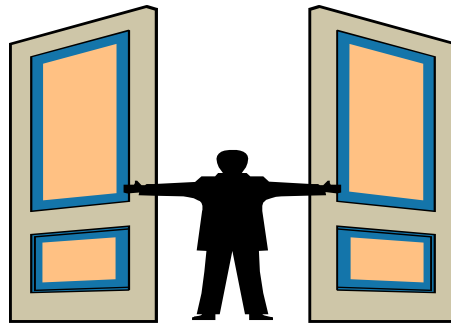
Open: What are some of responsibilities in your life right now? How will my schedule fit in with your current responsibilities?

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 some more questions that will help you find the right person for the job:

ENDING THE INTERVIEW TIPS

- ♦ **Thank candidate** for spending time with you
- ♦ **Be clear** with candidate **about next steps** in process (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 assistant as a next step in the process*)
- ♦ **Give a specific message** for candidate 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 10:00a.m. and 2:00pm if you're still interested*)

MAKING AN OFFER TIPS

*Timing and Process Are **Both IMPORTANT***

- ▣ *Return calls to **ALL** candidates who applied*
- ▣ *Make calls to offer position **in order of preference for hire***
 - ▣ *If there are more good candidates than positions, **ask candidates who won't be hired if they'd be available for emergency, back-up or future opening***

Actions to Take That Help to Avoid Unnecessary Coverage Emergencies:

- ♦ **Monthly Calendars:** Review in advance to identify if there are special coverage issues (e.g. dental appointments, events, holidays)
- ♦ **Special Occasion/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 details are known
- ♦ **Problem Getting To Work:** Ask assistants to contact you as soon as possible
- ♦ **Illness:** Talk with your assistant if s/he feels ill. Discuss the possibility of him/her not working the next day BEFORE s/he calls in at the last minute
- ♦ **Back-up/On-call Assistants:** Have several!
- ♦ **Build A Support Network:** Friends/family who can “come in a pinch” or bring you anything necessary.

Module 4

Facilitator Overheads and Participant Handouts

REAL PLAY: Consumer at the Center

Activity:

Anna is seated in a chair in the middle of the training room. There are four players (Narrator, Liz, Anna & Crystal). Each player is outside or at the edge of the room and comes in one at a time when called in by The Narrator (a facilitator). The Narrator introduces each character as they enter. See footnotes for further instructions.

Players:

Anna

A facilitator or carefully chosen participant plays this central character—a 45-year old person with quadriplegia who has been directing her own services for 20 years.²

Crystal³

A facilitator or carefully chosen participant plays this central character. Crystal is Anna's personal assistant for the past two years.

Liz⁴

A participant can play Liz. Liz has cerebral palsy and has lived independently in the same building as Anna.

Narrator:⁵

A participant can play the narrator. The Narrator introduces each character as they enter.

² Anna receives the entire Real Play.

³ Crystal receives the entire Real Play.

⁴ Liz only receives "Player One: Liz"

⁵ Narrator receives the entire Real Play.

FIRST PLAYER: LIZ

Narrator:

At 8:30 a.m. Anna's best friend Liz drops by to see Anna on her way to work. Liz has cerebral palsy and has lived independently in the same building as Anna.

Liz:

"Hey girl, glad you're up already. I wanted to do a last minute check-in on our travel plans before I head to the office. You know we only have 3 days left, and then it's sunny Bahamas and Caribbean waiting for us! I can't believe we actually found a travel agency that could arrange a cruise that can accommodate our needs."

Anna responds (quietly):

"Yeah, me neither. I thought I'd never get out of this town especially after my parents moved to Florida even though they stay in touch all the time. But you know, being alone and having to always look out for myself all the time gets to me sometimes."

Liz responds:

"Yeah, I know but this cruise is an opportunity for both of us to just kick-back and be pampered for a change. Are you getting a little worried? You don't exactly sound excited. And anyway, where's Crystal? Doesn't she usually get here by 8:00am? What now, sick again? Girl, you really need a break!"

Anna responds (quietly):

"Oh, don't get me wrong, I really want to go. It's just that nothing seems to come easy for me. Being someone's employer and friend can be the pits sometimes. Like now, this is the third time since I told Crystal that I'm going on vacation that she's come late. You'd think after two years and the way we're almost like family, that she'd be really happy for me. But she's doing this guilt-trip number on me."

Liz responds:

"She still giving you a hard time? See that's why I stick with agency services. Even though I have problems with some of the assistants they send, I don't have to deal with all that confusion. They start messing up, I just call my coordinator and tell them to send me someone else. Let the agency handle the problems, I say. Anyway, I'm going to be late if I don't get out of here. Call me at the office if you think about anything you need me to pick up for your packing. I'll stop by later."

SECOND PLAYER: CRYSTAL

Narrator: Crystal, Anna's personal assistant for two years, arrives just as Liz is leaving.

Crystal:

"Morning, Anna. Sorry I'm late but I had to get to the kids' school. That 15-year old is going to be the death of me yet. What do you want me to get started with?"

Anna says:

"It's okay. It's not like I'm going anywhere before you get here. Sorry to hear about the troubles. But look on the brighter side; at least when I'm on vacation, you'll have ten whole days just to spend with them. They'll probably like having you around for a change rather than taking so much of your day with me."

Crystal responds:

"Oh, I'm sure they'll like having me around. Then I'll do for them all day like I do for you. The big difference is they don't pay me! And I really don't know how I'm going to make it without a salary for the next two weeks. I guess when you said you'd pay me even when you took vacation, I didn't realize you were only talking about one or two days. Now, all I can think about is how am I supposed to make ends meet? I've even begun to answer some ads because, I keep telling you, I'm not sure I can be here when you get back."

Anna says:

"Oh, Crystal. Please let's not start this way again. You know I'm trying to figure out how I can give you the two weeks salary. I know we had an agreement, but I never dreamed I'd have an opportunity like this come my way. Haven't I tried my best to take care of you when you couldn't work? I've paid you even when you've been late or out sick. And don't get me wrong. I know you try to make up the hours each time. It's just that this is a lot more time, and a lot more money. I just don't know how I can swing it. I called my family and asked them if they could loan me the \$1000 for my trip so that I can pay you. My mother said she'd get back to me later this evening, but I feel so bad because my father's not doing so well, and I know they don't have a lot of money either with all those medical bills."

Crystal responds:

"Yeah, well, for sure we all got problems. Just let me know as soon as you hear from your mother. Now, after I get you bathed and we have breakfast, we can talk about what packing you want me to get started with. Just because we've been arguing about this so much lately, I still want you looking good for all those rich guys you're gonna meet on that cruise."

Narrator: End of Scene

DEBRIEFING QUESTIONS

The Narrator/facilitator should stop at this point to discuss with the group their reactions, feelings, and thoughts about the play, including the following points:

- 1) What did you see going on in this play? (get a few different perspectives)
- 2) People with disabilities often have little choice but to rely on others to help them live the life they want to live. What do you think about the situation Anna finds herself in?
- 3) Does Anna have the support she needs in her life?
- 4) Do you have an opinion about Anna based on her behavior in this play?
- 5) How would you describe Anna and Crystal's relationship based on the little bit you know from these scenes?
- 6) From what you saw, what do you think has contributed to the situation that Anna is dealing with?
- 7) Is there anything you think Anna could have done differently?
- 8) What ideas or opinions do you have about Crystal from these scenes?

(End initial debrief, and resume "Real Play" with insight to Crystal's situation.)

REAL PLAY: Worker at the Center

Activity

The Play continues and this time *Crystal*, the personal assistant, is at the center. There are three players. Two of the roles – Crystal and Anna - are continued from the previous Real Play and are played by the same participants (or facilitators). Crystal is (now) seated in a chair in the middle of the training room. Each player is outside or at the edge of the room and comes in one at a time when called in by the narrator, who will introduce each character as they enter.

Players:

Anna

Continue with the same player as in the Consumer at the Center Real Play.

Crystal

Continue with the same player as in the Consumer at the Center Real Play.

Narrator:

Continue with the player character as in the Consumer at the Center Real Play.

Paulette:

A participant can play Paulette. Paulette is Crystal's sister.

FIRST PLAYER: PAULETTE

Narrator: Paulette, Crystal's sister, calls at 9:30pm.

Paulette

"Crystal, I've been trying to get you all day. I thought you didn't have to work on Mondays."

Crystal responds:

"I usually don't but I had to make up for some hours that Anna already paid me for. You know with this situation going on, I can't afford to miss out on any pay."

Paulette responds:

"Well, I'm really glad to hear your voice. Since Robert got out of jail and came back there to live with you, I never know what to think when I can't reach you."

Crystal responds:

"Well, don't worry about me so much. I can handle myself. But I must say, he's putting all this pressure on me for money since he can't find a job. And the kids are going crazy, too. I had to go to school this morning because Alex was suspended for fighting. Ever since his dad came home, he's been acting out. He hates sleeping in the living room so that his dad and I have privacy."

Paulette responds:

"I guess working those 12-hour shifts with Anna doesn't help the home front either, even if it does pay the bills."

Crystal responds:

"Right on both counts...it don't help and I need the money. I've been feeling really rotten lately putting pressure on Anna to pay me for the 10 days that she'll be away on her vacation. But, she'd always paid me in the past when she went away to her family for a couple of days. And I just can't go two weeks without pay. Every payday, Robert's waiting at the bank demanding that I give him half my check. We're two months behind in rent, and if I don't give them at least half next week, they're threatening to evict us. And now he's starting to drink more and more. He came in drunk last night screaming and yelling about how unfair it is that no one will hire him."

Paulette responds:

"That's what I'm saying, he scares me! Have you told Anna any of this?"

Crystal responds:

"No, you know how private I am about my personal business. Besides, I'm so embarrassed to talk with anyone about this situation besides you. I was stupid enough to hook up with him and have those babies with him. And, I sure don't want to blab all over the place that he's out of jail, and back in our lives."

Paulette responds:

"I hear that. So what are you going to do? Is Anna going to give you the money for when she's away?"

Crystal responds:

"Well it sounds like she will. I thought this was her calling. She asked her mother to loan her the money. She lied and said she needed it to go on her vacation. Paulette, I feel like such a creep! This cruise is the dream of a lifetime for Anna. And no one deserves it more. She's never been further away than to visit her parents. And she's the sweetest person I've ever worked for. No one else ever offered to pay me when I was sick or on vacation. And she's always understanding when I have to be late or switch my hours. But we've been fighting so much lately because I've had to put this pressure on her to pay me. But what can I do? I've got to pay that back rent by the end of the month or we're out in the street. I told her, if she can't pay me, I just have to go back to the agency. I know they'll hire me right away and I'll get the top rate because they love me there. Oh, oh...there's my call waiting. Maybe that's Anna with good news! Call you back."

Crystal and Anna

Narrator: Anna is calling in.

Anna:

“Hi, Crystal, it’s me Anna. I’ve got good news, my mom’s going to send me the money. She’s wiring it tomorrow. Can you borrow your brother’s van to take me to Western Union?”

Crystal responds:

“Oh Anna, you don’t know how relieved I am to hear that. I’ve felt so bad about our fighting lately. You really are the best person I’ve worked for since I became a personal assistant! I’ll call my brother right away and see about the van. And I’ll ask him about borrowing it again to take you to your cruise ship. I’ll see you tomorrow morning bright and early. Like I told you today, I want to make sure that you look really beautiful when they wheel you onto the ship. And maybe when you get back, we can talk about some stuff that’s been going on for me.”

Narrator: End of Play

DEBRIEFING QUESTIONS

The Narrator/facilitator should stop at this point to discuss with the group their reactions, feelings, and thoughts about the play, including the following points:

- 1) Many personal assistants have complicated lives that force them to choose between the needs of the disabled person they work with, and their personal needs. Oftentimes they may not share these complexities fully even though they may have a very good relationship with that individual. What do you think about the situation Crystal finds herself in?
- 2) What led to your initial impressions about Crystal? Does knowing more background about Crystal and her situation change your opinion about her? Why/why not?
- 3) What do you think about the way Crystal is going about trying to address her feelings and her problem? How is her way of addressing her problems similar or different from Anna's?
- 4) Did she have other alternatives than asking Anna to pay her salary (if so, what were they)?
- 5) If you were in the assistant's place, what would you have done?

Teaching Tips for the REAL PLAY

The goal for this exercise is to help consumers better understand the complexity of the employer/friend relationship they share with their personal assistants, and how “in the moment” negotiated decisions (even with the best intent) can place undue stress on the boundaries of the employer/worker relationship. In any extended relationship, boundary limits are tested. In the give and take of the social relationship, if the boundaries are kept in balance individuals develop a sense of inter-dependence. In the blur of the “friend as employer” or “employer as friend” consumer/personal assistant relationship, it is often very difficult to bring the relationship back in balance because the consumer/employer is dependent on the assistant to live their lives as they choose.

Added to this challenge, consumers and workers face problems that need to be addressed inside and outside of the “work” relationship. Effective communication can make a significant difference in resolving these issues when they emerge. The essential content to reinforce is:


1. All extended relationships test boundaries as a way of developing and maintaining trust.
2. While boundary testing in the consumer with disabilities/personal assistant relationship is a natural aspect of their developing trust, the consumer/employer needs to be mindful that the primary relationship is one of employment to best ensure that their safety and support needs are met.
3. Even small allowances in extending the employer/assistant relationship may ultimately lead to a sense of diminished authority for the consumer.
4. Inappropriate extension beyond employer/worker boundaries isn't necessarily permanent.
5. There was a problem with Anna and Crystal that might have been avoided with more effective communication. Communication is necessary for workers and consumers to stay on the same page.

6. Effective communication, assertive, clarity about work agreement early on in the relationship, and willingness to address issues as they emerge are tools consumer can use to handle these situations.
7. When people are stressed, they often take it out on the people closest to them or the people they most depend on.
8. We don't know the story behind people's behavior until we hear what's going on for them. Being curious and open about a worker's motives for a given behavior, can help to lay a foundation so that the consumer and personal assistant can work together to find satisfactory solutions.
9. Being mindful that both workers and consumers with disabilities may be dealing with significant problems which make it challenging to manage their lives will help consumers with 'difficult conversations' as they arise

Module 5

Facilitator Overheads and
Participant Handouts

Personal Care Planning List- Beginning to Staff

	Needs:	How Often (days a week/ times a day)?	How long does it take (total)?	Preference of time of day (am/pm):	Notes (include preferences and other things):
A D L ' S	Bathing/Showering	Daily	30	am	Sometimes takes longer
	Dressing	Twice daily	30	Am/pm	
	Grooming (Shaving, hair care, Make-up, oral care)	Once daily	30	Am	Once a week I like to have my hair styled which takes longer
	Meal Preparation	3X daily	50	Normal hours	Assist only
	Eating		0		
	Bowel Care	Once daily	20	Pm	
	Bladder Care	Twice daily	20	Am/pm	
	Turning in Bed		0		
	Transferring	Twice daily	10	Am/pm	
	Exercising	Once daily	20	Pm	
	Other:				
		TOTALS:	3 ½ hours		
I A D L ' S	Writing Letters/Mail				
	Grocery Shopping	2X week	2 hours		
	Computer				
	Making Bed	daily	10 minutes		
	Driving (Van?)				
	Errands	2X week	2 hours		
	Laundry/ Ironing	Once week	2 ½ hours		
	Housekeeping	3X week	One hour		
	Answer Phone	Never			
	Child Care Pet Care	None 3X week			

	Reading	daily	5 minutes		Read the mail
	Others: <i>Bills</i>		Once week	20 minutes	Check writing
	TOTALS: 15 minutes daily; Monday and Wednesdays (groceries and errands) 4 hours; Sunday, Tuesday, Friday: 1 hour 20 min. for housekeeping and cat care; Thursday or Saturday laundry: 2 ½ hours				
M E D I C A L	Needs:	How Often (days a week/ times a day)?	How long does it take?	Preference of time of day (am/pm):	Notes (include preferences and other things):
	Pressure Relief/ Positioning	0			
	Medications	daily	5	TID	Assist in opening caps
	Range of Motion	See daily exercise			
	Skin Care/ Inspection	daily	While in shower	am	
	Suctioning/ Resp. Care	None			
	Wound Care	If I get a wound!			
	Diabetes Care	Nope!			
	Other:				
	TOTALS:		15 minute for meds		

CONTINUED ON THE NEXT PAGE

So from this I know that:

Monday thru Sunday I need: 4 hours of personal care

On Monday's and Wednesdays: the aide will be out with errands and groceries for the remaining 4 hours

On Sunday, Tuesday and Friday: Housekeeping and cat care takes about 1 hour 20 minutes;

On Thursday or Saturday: Laundry which takes about 2 $\frac{1}{2}$ hours

Monday	Tuesday	Wed.	Thursday	Friday	Saturday	Sunday
4.5 personal care	4.5 personal care	4.5 personal care	4.5 personal care	4.5 personal care	4.5 personal care	4.5 personal care
4 hours errands and groceries	1 hr. 20 minutes housekeeping cat care	4 hours errands and groceries	2 $\frac{1}{2}$ hours Laundry	1 hr. 20 minutes housekeeping cat care		1 hr. 20 minutes housekeeping cat care

(SAMPLE)
CONSUMER/PERSONAL ASSISTANT
WORK AGREEMENT

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:							

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.

(Personal Assistant): Initial below appropriate agreements between (employer name) and (personal assistant):

_____ 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 Care Planning List):

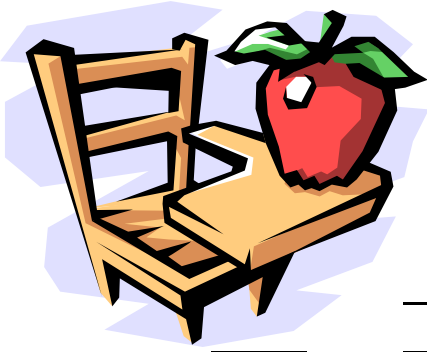
We mutually agree TO TREAT EACH OTHER WITH MUTUAL RESPECT AND SUPPORT AND WE WILL TRY TO BE FLEXIBLE AND WORK AT SOLVING PROBLEMS AS THEY ARISE.

TWO WEEKS NOTICE WILL BE GIVEN BY EITHER PARTY REGARDING TERMINATION OF THIS AGREEMENT.

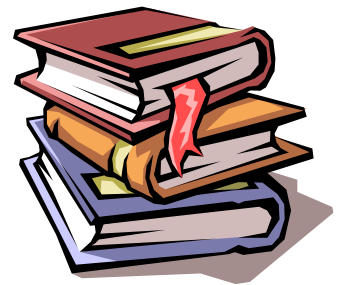
Personal Assistant Name/ Date

Employer Name / Date

MY BEST AND WORST LEARNING EXPERIENCES:



MY WORST LEARNING EXPERIENCE WAS:



MY BEST LEARNING EXPERIENCE WAS:



PERSONAL STYLE CONTINUUM

Each of these represents the extreme in each dimension of personality. Most people will find themselves responding to some items on one side, and some on the other. Pay attention to the items that elicit in you the strongest response – chances are you are closer to that end of the continuum.

Remember that each person is unique, and this is designed to give you insight into your own and others' way of being in the world. No place on the continuum is right or wrong, or better or worse. The goal is to better understand oneself and others, and appreciate how we might be triggered by or have judgments about others whose way of being is different from ours. Once we are aware of our styles, it becomes possible to change our approach and communicate more effectively with people who are different from us.

Here are four personal style dimensions. Imagine a line with these poles on either end of the line. Where would you stand? For example:

Introvert _____ **Extrovert**

Based on the items below, where on the line would you place yourself?

INTROVERT	EXTROVERT
<ul style="list-style-type: none">▪ Prefer to think alone to solve a problem or deal with a situation.▪ Tend to be reserved or shy in social situations.▪ Fascinated with internal process (their own thoughts) and less tuned in to others.▪ Tend to be quiet, and focused on a task.▪ Like working alone.▪ May dislike being interrupted.	<ul style="list-style-type: none">▪ Prefer to work through a situation or problem by talking it out with others.▪ Outgoing and tend to enjoy social situations.▪ Interested in pleasing others.▪ Enjoy variety and tend to choose relationship first, task second.▪ Like working with people.▪ May become impatient with long, slow tasks.▪ Don't mind being interrupted.

PERSONAL STYLE CONTINUUM Continued

<p>BIG PICTURE ORIENTED</p> <ul style="list-style-type: none"> ▪ Needs to know the overall picture before being able to focus on specific details. ▪ Likes ideas, concepts, theories. ▪ Becomes bored with nitty-gritty details and facts. ▪ Tends to be intuitive – making decisions based on gut feeling rather than facts. ▪ May leave out or neglect details or make errors of fact. 	<p>DETAIL ORIENTED</p> <ul style="list-style-type: none"> ▪ Needs to know the facts, the specific details before being able to focus on the overall picture. ▪ Likes the concrete, real, factual, tangible. ▪ Becomes impatient with theory, abstract ideas or concepts. ▪ Thinks in careful, detail-by-detail accuracy, making decisions based on all the facts. ▪ May miss the big picture.
<p>FEELER</p> <ul style="list-style-type: none"> ▪ Makes decisions about people and life based on feelings – compassion, warmth, personal values. ▪ Gets along well with people. ▪ Cares about others' feelings and how they feel about them. ▪ Tends to be swayed by feelings rather than rational argument. ▪ Likes conciliation and harmony. 	<p>THINKER</p> <ul style="list-style-type: none"> ▪ Makes decisions about people and life based on rational thinking – logic, factual evidence, not personal values or others' feelings. ▪ May step on others feelings without realizing it. ▪ Tends to be swayed by rational argument rather than feelings. ▪ Tends to have some tolerance for interpersonal conflict.
<p>PRESENT ORIENTED</p> <ul style="list-style-type: none"> ▪ Prefers to be spontaneous, "in the moment". ▪ Likes to see all sides to an issue; OK with changing their mind. ▪ Goals are subject to change based on new information. ▪ May become involved in many tasks or activities at the same time. ▪ Uncomfortable with closure, definite endings. 	<p>FUTURE ORIENTED</p> <ul style="list-style-type: none"> ▪ Likes to plan, think about the future. ▪ Is firm, clear, sure. Makes a decision and sticks to it. ▪ Sets goals and works toward them. ▪ Likes to finish one task before moving on to the next. Tends not to look back. ▪ Likes closure, a clear ending.

WHAT'S YOUR STYLE?

OF LEARNING, THAT IS...

Here are some questions to help you identify your favorite style of learning. **Your answers will reflect you as an individual.** For each question just circle the letter (A,V, or K) next to the statement that best describes how you would respond to these situations..

1. When you are about to cook a meal for the first time, do you:
V – Look through cookbooks- drawn to the recipes that have pictures?
A – Call family or friends and ask for advice or their recipes?
K – Remember what you saw on the cooking show last night- and just dive in?
2. What do you remember most about movies you have seen?
V – the setting, the scenery and costumes
A – the music, sound effects and what the actors said
K- the way the movie made you feel
3. In terms of conversations and talking, what is most characteristic of you:
A- enjoy listening to the other people; asking a lot of questions?
K- gesture and use expressive movements- talk with your hands?
V- talk only when you need to, but dislike listening too long.
4. If you have some spare time, would you rather:
K – play a sport or do something physical?
V- watch t.v., go to the movies, go to a play?
A- listen to music, radio or read?
5. Which statement below, best describes your memory:
V- I forget names, but remember faces...
A- I forget faces, but remember names...
K- I forget faces and names, but remember what I did.
6. If you are learning about something new, do you prefer the instructor to:
V- use lots of overheads, have lots of handouts, and use a book?
A- interact with you- asking questions, seeking your opinion?
K- have lots of hands-on demonstrations, role plays and practice
7. When you are trying to concentrate, do you:
A- become distracted by sounds and noises
K- become distracted by playing with a pen, something you are wearing, or other object near you?
V – become distracted by untidiness or movement?



8. If you are at a meeting or group discussion, do you:
V- take notes to remember what is being said?
A- enjoy discussing issues and are always thinking of things to say?
K- Like to doodle while others are talking?
9. Do you determine someone's mood by:
V – looking at their facial expressions?
K- watching their body movements?
A – Listening to the tone in their voice?
10. When you go shopping in the supermarket, are you most likely to:
V- bring a list and follow it closely?
K- walk up and down the aisles- figuring out what you need as you go?
A – repeat the list you memorized over and over until you have everything you can remember?
11. If you are driving to your new doctor's office in the next town, how do you plan out the trip:
A- Ask the receptionist to give you verbal directions; stop at gas stations?
V- Buy a map! Or check out Map Quest before you go
K- Figure it out as you go, you're pretty good at getting around
12. If you bought something that has to be assembled (e.g. a bike), do you:
V- Find the directions before getting the other pieces out of the box; follow the instructions and look at the pictures?
A- ask other people questions about the project- get someone else involved and ask them to tell you what to do while your doing it?
K- dive right in and start putting things together, ignoring the instructions?
13. When you are learning, which do you like best?
V- seeing demonstrations, diagrams, videos and posters?
A- listening to verbal instructions or lectures?
K- role plays and acting out new skills/ lab work/ field trips?

Now count up the number of V's you have and put the number here: _____

Now count up the number of A's you have and put the number here: _____

Now count up the number of K's you have and put the number here: _____



AUDITORY LEARNERS



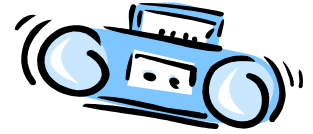
- ▣ Respond well to storytelling (personal stories and case scenarios illustrate the point you are trying to make)

- ▣ Listen to the lecture and refer to the handouts



- ▣ Use handheld recorders

- ▣ Prefer face-to-face communication (enjoy small group discussions and debates)



- ▣ Are easily distracted when there is a lot of noise or other conversations occurring

- ▣ May not take notes



- ▣ Use mnemonics to memorize. For example: Roy G. Biv is a common mnemonic for the colors of the rainbow, red, orange, yellow, green, blue, indigo, violet.



KINESTHETIC LEARNERS



- ▣ Are hands-on learners
- ▣ Need to be active in the learning
- ▣ Like games, role plays, lab work



- ▣ Do not enjoy lectures (tap on the table, squirm in their seats, easily distracted by movement)



- ▣ Need to move around
- ▣ Most animated role players

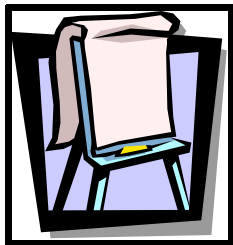
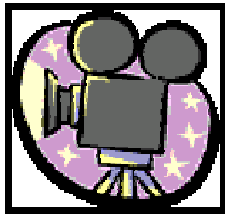
- ▣ Doodle in class

- ▣ Skip reading instructions when trying to assemble something new





VISUAL LEARNERS



- ▣ Associate pictures with concepts being learned (Use: Video, TV, PowerPoint presentations)

- ▣ Drawn to the pictures in materials handed out/ in books

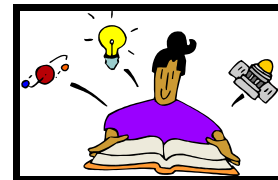
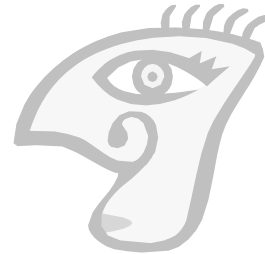
- ▣ Think in visual images instead of words

- ▣ Take notes, always writing—may ask trainer to slow down in order to keep up (use overheads and PowerPoint presentations)

- ▣ Like graphs, tables and charts

- ▣ Use **highlighters** and brightly colored post-it notes

- ▣ Like to make flash cards



OTHER FACTORS TO CONSIDER

- ✓ Divide the work fairly
- ✓ Diversify your staff
- ✓ Maintain a home that supports the consumer and the personal assistant
- ✓ Assess and plan for unpredictable events
- ✓ Keep a master calendar
- ✓ Keep organized records
- ✓ Discuss confidentiality



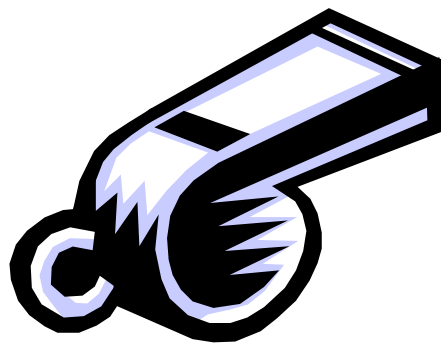
- ✓ Know when, where and how you want privacy
- ✓ Discuss how friends and family fit into your life
- ✓ Clarify roles

Module 6

Facilitator Overheads and Participant Handouts

WHY COACHING?

- ☐ Enhances Retention
- ☐ Diffuses Conflict
- ☐ Improves Problem Solving
- ☐ Improves the likelihood that the clients and workers needs will be met



Role Play Scenario: Traditional Supervision

Supervisor: Okay, Helen, you know I've called you in here because we have a problem with your being late.

Worker: Yeah, well, the charge nurse — Lisa — said something to me about that.

Supervisor: So I have written down here that in the past two weeks since you started working, you came in at 3:20 on Tuesday, you came in at 3:50 on Thursday. And then just this past week, on Tuesday, you came in at 4:08. That's when you clocked in. You know this is a problem, right Helen?

Worker: Oh, yeah. Yeah, I guess.

Supervisor: When you were in orientation we went over with you how important it is to be on time. You know that we have to cover shifts and that the aides who work the shift before you leave at 3:00. If you're not here there is no way the work that needs to be done can get done. You know that, right?

Worker: Mm hmm.

Supervisor: So Helen, what's the problem here?

Worker: (Sighing) The buses — at least three times a week, the buses are not coming on time. I'm there, most of the time — there for the right bus that should get me here on time, by 3:00. But a lot of times I'm waiting there ten or fifteen minutes, waiting for the bus to come. The bus is just killing me.

Supervisor: So the problem is the bus.

Worker: Yeah.

Supervisor: Well, you know that it's your responsibility to get here on time. And if your experience is that the bus is not getting you here on time, then Helen, you are going to have to do something about it. Which means that you are going to have to get a ride with somebody, go on another bus route, or take an earlier bus.

Worker: Well, I —

Supervisor: Are you willing to do that? Because your willingness to do that is an indicator of whether you're willing to do what it takes to stay in this job.

Worker: I'll try. I just...sometimes it might be hard for me to get an earlier bus. But I'll try.

Supervisor: Helen, I need more from you than that you'll try. I need to know that you're willing to do this, because you need to be here at 3:00. You should consider this a verbal warning. If you're late again, you'll be written up for it.

Worker: I'll take care of it. Don't worry.

Supervisor: Okay.

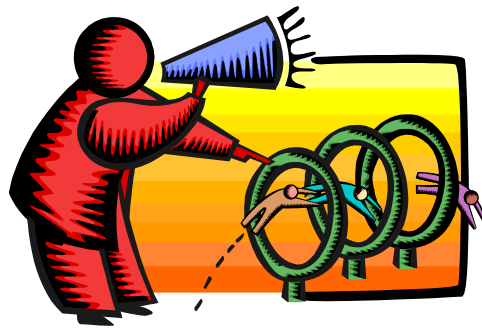
Worker: You going to fire me or something?

Supervisor: I'm not going to fire you. I'm going to assume that you'll keep to your word and that you'll take care of it and be here regularly at 3:00.

Worker: It won't be a problem anymore.

ELEMENTS OF TRADITIONAL SUPERVISION

- ▣ Identify issues to be addressed
- ▣ Explain the rules clearly
- ▣ Explain the consequences of breaking the rules
- ▣ Offer possible solutions to the problem
- ▣ Request that the worker comply with work rules



Role Play Scenario: Coaching Supervision

Supervisor: Helen, you've been working for two weeks now. How's it going?

Worker: Okay.

Supervisor: I asked you to come meet with me because I understand that you've had a problem with being late a few times over the past two weeks.

Worker: Oh, well, just a few times. Yeah.

Supervisor: What I have written here — from a conversation I understand you had with Lisa, the charge nurse — is that there were three times you were late, including Tuesday and Thursday from last week, and then again this past Tuesday. And each of those times you were 15 minutes or 45 minutes or even over an hour late on one occasion. So I imagine that something must be going on for you that is creating this problem, and I'd like to hear about it.

Worker: Mm. I'll try to correct it. It's just that...the buses run late sometimes, and I'm standing there for sometimes 15 or 20 minutes. A lot of times it doesn't come on time.

Supervisor: That must be very frustrating.

Worker: Yeah! It's very frustrating! I don't know how much those drivers get paid, but they should get docked for that.

Supervisor: Mm hmm. It has really hard consequences for you. Something you don't have much control over.

Worker: Right. Can't get to work on time! I get so mad there's smoke coming out my ears.

Supervisor: So, Helen, clearly you have a problem in terms of being able to rely on the bus. I don't have to ride the buses myself, so I haven't had to deal with that. That must be really difficult for you.

Worker: Yeah.

Supervisor: And I appreciate that it takes a lot to get here on the bus on a daily basis.

Worker: Sometimes. When it's running late, it's just...aggravating.

Supervisor: I assume that you don't have another option, other than the bus. Is that right? The bus is your only way to get here?

Worker: Right. I don't have a car. I don't drive.

Supervisor: Uh-huh. That's hard. So, we have a situation where the bus is not reliable, so you're not always able to get here on time. But on the other hand, I'm sure you appreciate how important it is that you are here on time.

Worker: Well, yes. I do. I got to take care of my residents. Somebody's got to be here for the residents.

Supervisor: Right. And as you know, we're often short staffed. So having you not show up on time really makes a difference. Your presence makes a difference in terms of getting work done, but it also makes a difference to particular residents, as you know.

Worker: Uh-huh.

Supervisor: I heard that you've established really sweet relationships, particularly with Mrs. Smith and Miss Alice.

Worker: Oh yeah. They're great. We have a good time.

Supervisor: They really love you.

Worker: Really? Well that's...nice to hear that.

Supervisor: Helen, I would like for this to work out. Very much. Because we really appreciate having you here, and we can't have this situation continue where you're coming in late. So I'm wondering if we can brainstorm together what might be possible options for you, in terms of how to deal with this. Is it possible for you to take an earlier bus, so that you can be sure to be here on time?

Worker: Well, uh...it's hard for me to take an earlier bus, actually. Because of what I'm coming from.

Supervisor: Are you willing to let me know what you're coming from? Because maybe I can work with you on this.

Worker: Well...I guess. I have a — another part time job I have, doing some private duty for a client.

Supervisor: A home health client?

Worker: That's right. I'm supposed to get off by 2:00, but...she has so many needs. I hate to go when there's stuff that hasn't gotten done yet, and she really hates to see me leave. So sometimes it's hard to get away. But...

Supervisor: That doesn't surprise me, given what I've seen of you here and the attachment that you have to residents. I'm not surprised to hear you have a hard time leaving a client who really needs you.

Worker: Yeah. I guess I am a pretty caring person.

Supervisor: That's clear. We would never want to take that away from you. But it seems like the caring you have for your home health client is making it difficult for you to get out on time, and getting out on time is important to you, right?

Worker: Yes. It's really important. I promise it won't happen again. I'm going to make sure I get out on time. I promise.

Supervisor: Helen, I trust that you believe that and really want to make a change.

Worker: I really do.

Supervisor: But I'm not convinced that in a couple weeks you might not get pulled back into the same thing with your home health client, because you're so caring. So I think it would help us to think through strategies that you could use, to make sure that you get yourself out on time.

Worker: Right.

Supervisor: What worked for you on the days that you managed to get here on time?

Worker: Well, most of those days the 2:30 bus was on time. That's the main thing. And a couple of days I managed to get out on time to catch the earlier bus, the 2:10 bus.

Supervisor: So if you get out on time, you can manage to get the earlier bus. And even if that bus is a little late, you'll still get here on time. Is that right?

Worker: Yeah. So I just need to get out on time.

Supervisor: Mm hmm. Your client loves you and needs you and likes having you there. But leaving on time isn't a health or safety issue, right?

Worker: Right. She's okay without me.

Supervisor: So clearly, Helen, you have no control over the bus. But you do have control over when you leave your client's house, even though it might not seem that way.

Worker: Yeah, I guess that's true.

Supervisor: What do you think might work for you, to remind you of that? And to remind you that there's serious consequences to your not leaving on time?

Continued...

Worker: Well...I could think about all the people here in the facility that need me, too. And that I have to go 'cause I might lose my job, and that would be terrible. If I tell my client about it, that could help. Because she cares about me, too. Maybe if she has a lot of things for me to do and I run out of time, we could make a list and I can make sure to do them next time.

Supervisor: Great! Seems like you've had some practice prioritizing and setting limits in other parts of your life.

Worker: Oh...with my kids, every day. They want so much out of me.

Supervisor: If kids don't teach us to set limits, nothing will! So you have a number of different options. There's reminding yourself about the people who need you here at the facility; there's reminding yourself that your job here is at stake; there's letting your client know about the problem so that she can help support you in getting out on time. And you also had a great idea of making a list at the end of your time with her each day, of the things you'll get to the next time. So you think all this will work?

Worker: Yeah, I think it will. I'm sure it will make a difference. I just never thought about it that way.

Supervisor: What strikes me is that you're changing something with your client that's been going on for a while — you've let her keep you longer than you're supposed to stay, because you're a kind and caring person. So she may put up a little battle at first.

Worker: Oh yeah, she's a fighter!

Supervisor: You'll have to be strong. But you also may need some support from the outside. And I'm willing to be that support for you.

Worker: Wonderful.

Supervisor: I'd like us to set up a kind of contract, where you'll check in with me about how it's going. Not in the sense that I'm checking up on you, but in the sense that I want to support you in doing this. It's hard to change patterns that have been going on for a while.

Worker: Yeah.

Supervisor: So how about this, next week — Tuesday and Friday — I'll find you on the floor and we'll check in with each other about how it's going.

Worker: Tuesday and Friday. I'll look for you.

Supervisor: I'm writing it down here. Maybe you should write it down, too.

Worker: All right.

Supervisor: I'll come and find you on the floor.

Worker: Come right at 3:00! You'll see that I'm there.

Supervisor: Great. In terms of our policy, I'm going to see this conversation as a coaching for improvement session. I need to tell you, though, that if you are late again, it will be documented in your personnel file, and we'll have to come up with a remedial plan.

Worker: That's not going to happen.

Supervisor: I trust that it won't. It's been a pleasure talking with you, Helen.

Worker: For me, too.

WHAT A COACH SUPERVISOR DOES

Create relationship

- Demonstrate interest in the person
- Set tone: Build a safe “container”
- Indicate belief in the person

Clear statement of the problem

- State the problem in clear, objective, non-judgmental terms
- Put in context of other positive behaviors, attributes
- Move to future –orientation

Information on Worker’s Perspective

- Ask open questions
- LISTEN actively
- Follow up on curiosity
- Acknowledge worker’s perspective
- Reflect Back

Self Awareness as Coach

- Manage emotions so they don’t get in the way of listening
- Self disclose, as appropriate

Problem-Solving

- Maintain focus on work-related behaviors
- Brainstorm options
- Reframe the problem
- Ask for ideas, offer suggestions
- Offer information/ask questions about impact of choices
- Present new possibilities
- Request actions

Action Steps / Commitments

- Collaboratively plan/ set goals
- Collaboratively set specific, measurable action steps
- Mutual commitments

Follow-up

- Awareness of and follow through on commitments.

ELEMENTS OF COACHING SUPERVISION

- ▣ Create a relationship with the worker
- ▣ Provide positive constructive feedback
- ▣ Elicit the workers perspective
- ▣ Re-frame the issue
- ▣ Help the worker solve the problem for herself
- ▣ Help plan action steps and make a mutual commitment to follow up
- ▣ Hold the worker accountable

ACTIVE LISTENING

- ❖ Good listening is essential to clear, effective communication, and is of primary importance in intermediary supervision.
- ❖ “Body language” refers to the way people communicate non-verbally, through postures, facial expressions, gestures, and movement. Body language often communicates more clearly than words. Since people often respond to our body language rather than to our words, we must become more aware of our body language and learn to control it.
- ❖ *Active* listening, i.e., listening with full attention to the other person -- including attentive body language -- is the underlying skill in intermediary supervision for the following reasons:
 - Being listened to attentively feels caring and helpful to the speaker. Not being listened to, or being listened to in an inattentive manner, feels hurtful and unhelpful.
 - 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.

LEAD INS FOR CLARIFYING QUESTIONS

- **SO TELL ME WHAT HAPPENED TO LEAD YOU TO THIS DECISION..**
- **COULD YOU TELL ME MORE ABOUT...**
- **I'D LIKE TO HEAR ABOUT...**
- **CAN YOU SAY MORE ABOUT...**
- **CAN YOU GIVE ME SOME MORE DETAIL SO I CAN GET A CLEARER PICTURE OF WHAT HAPPENED?**
- **SO YOU DID/ THOUGHT / FELT ... AND THEN...?**
- **I'M REALLY INTERESTED IN / CURIOUS ABOUT....**
- **I'M INTERESTED IN WHAT YOU WERE THINKING/FEELING WHEN YOU...**

PARAPHRASE AND CLARIFYING QUESTIONS

WORKSHEET

1. "I am not coming in to volunteer for overtime. I just need to ask you about my schedule for next week."

Paraphrase.

Clarifying Questions.

2. "I'm sorry I can't make it in today. I am so tired. I just can't even keep my eyes open I'm so tired."

Paraphrase.

Clarifying Questions.

3. "I'm not the one at fault for this mess. Your overnight PA is a nightmare to work with! You don't know because your sleeping when he is here and don't know what he's getting into."

Paraphrase.

Clarifying Questions.

4. "I know I was late. It will never happen again- give me a chance, you have to believe me."

Paraphrase.

Clarifying Questions.

TEN LISTENING BLOCKS

Everyone does pseudo listening at times. The problems arise when it is important to do real listening, or when you do pseudo listening most of the time. Listening is the most fundamental and most important communication skill. A lot of the time we act like we're listening, but we aren't doing real listening, we are doing *pseudo listening*. We may look like we're really listening, but what we're often doing is more like:

1. Making people think you're interested so they'll like you.
2. Being alert to see if you may be rejected.
3. Listening for one piece of information and ignoring everything else.
4. Buying time while you prepare your next comment.
5. Half-listening so someone will listen to you.
6. Listening to find someone's weak points or to take advantage, or to make sure you are right.
7. Half-listening because you don't know how to get away without offending the person.

You can become more aware of doing pseudo listening when you notice the listening blocks you use. Being aware of them makes it possible not to use them, or to use them less.

This material adapted from McKay, Matthew, Davis & Fanning: Messages, the Communication Book

Ten of the common blocks to listening are:

1. Mind Reading

Rather than paying attention to what the person is actually saying, you're trying to figure out what they are *really* thinking or feeling. Mind readers make assumptions about what people mean and how people react to them, usually based on body language and other non-verbal cues.

Examples:

2. Comparing

When you compare you have a hard time listening because you're trying to see who is smarter, more caring, more competent – you or the person speaking. You can't let much in because you're trying to see if you measure up.

Examples:

3. Rehearsing

You can't really listen because you're practicing what you're going to say next. You may look like you're listening, but your mind is going a mile a minute because you've got a story to tell or a point to make.

Examples:

4. Filtering

When you filter, you listen to some things and not to others. You pay attention enough only to hear what you feel you need to hear, then your mind wanders. Or you may filter to avoid hearing certain things – negative, critical or unpleasant. It's as if the words were never said.

Examples:

5. Judging

When you judge you dismiss someone based on who they are or what they say. Then you aren't really listening, but are having a "knee jerk" reaction.

Examples:

6. Dreaming

You are half listening, and suddenly what the person says triggers a chain of private thoughts. Then you are gone, and don't hear what the person says. You are prone to dreaming when you feel bored or anxious.

Examples:

7. Identifying

What the person says reminds you of your own experience, so now you're not listening to them, you're thinking about what happened to you. Often you're just waiting for them to finish so you can tell your own story.

Examples:

8. Advising

Before someone has really got to what's troubling them, you are jumping in with suggestions about solving the problem. You are thinking about what to do as they are talking.

Examples:

9. Sparring

When you spar, you are quick to disagree – often listening only for points to argue with. This tends to happen when you have strong opinions on a subject. One sub-type of sparring is the *put-down*, using sarcastic remarks to dismiss the other person's point of view. Another is *discounting* – to run yourself down when you get a compliment.

Examples:

10. Placating

When you placate, you are nice, pleasant, supportive, but you're not really listening. You will generally agree with what's being said, without really taking it in. In this mode you may also be patronizing. It is a listening block often used with children and older people.

Examples:

Think about how these blocks come up for you, especially in the context of supervision.

What will help you become aware that you are using these blocks?

What strategies might you use to get back to really listening when you recognize that your listening is blocked and you want to really listen?

Identify below your most common listening blocks.

1. _____

2. _____

3. _____

CHOOSING "OPTION B"

When people act in ways that

DON'T MAKE SENSE

or

CREATE PROBLEMS

(for you, themselves or others)

WHAT HAPPENS FOR YOU?

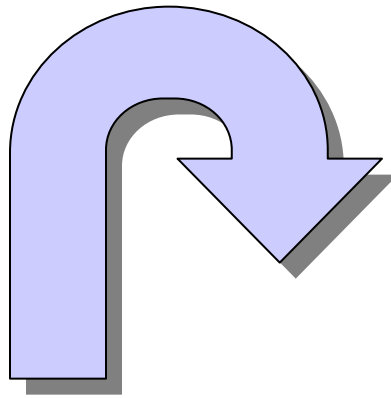
What do you FEEL?

What do you THINK?

What do you DO?

We can prepare ourselves for a
DIFFICULT PERSON

Or we can prepare ourselves for a
DIFFICULT CONVERSATION



We can prepare ourselves to SPEAK

Or we can prepare ourselves to LISTEN

When we are emotionally

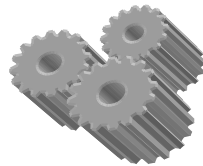
TRIGGERED

*When we get heated
Reactive
Provoked
Feel some kind of way.....*

Angry

Hurt

Frustrated



Sad

Hopeless

We have a **CHOICE**

In how to respond...

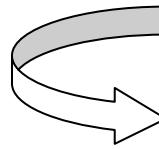
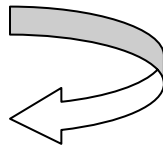
LISTEN



form an OPINION



CHOICE POINT



OPTION A

OPTION B

DEFEND OUR OPINION

SUSPEND OUR OPINION

Resist theirs

Listen Actively
w/o Blocks or Judgment

*Look for Evidence
to support our
Opinion*

*Look with curiosity for
new insight, information or
awareness*

Discount Evidence
to the contrary

Stay open to being changed

Option A generally leads to:

- ❖ Feeling justified or self righteous
- ❖ Being judgmental
- ❖ Blaming the other person
- ❖ Holding onto anger, resentment, mistrust
- ❖ “Self-fulfilling prophecy” – person will act the way we expect
- ❖ Difficulty thinking clearly
- ❖ Difficulty in being open to believing or trusting the other person
- ❖ Inability to listen, BLOCKS, to listening

**To choose option B,
we need:**

1. Self Awareness

2. New Behaviors

**To Develop New Behaviors
and Self Awareness**

STEP ONE: SLOW DOWN

STEP TWO: PULL BACK

PULLING BACK: WHEN FEELINGS GET IN THE WAY OF LISTENING

What behaviors / people/ situations get you hooked?

- The same problem over and over again
- The other person is taking no responsibility for the problem
- I feel blamed / attacked / defensive
- The sense that I am failing / have messed up
- The other person's issue is too close to the bone for me
- I'm being blamed for something that isn't my fault
- I think s/he is lying.
- I think / know I'm right
- My idea was brilliant and s/he won't accept it
- I think this will go on forever and I don't have the time for it
- The other person's behavior reminds me of my mother/spouse/ex, etc.
- When I'm tired, stressed, or just not in the mood

Others... _____

What is your method to get unhooked – your Pull Back strategy?