This section explains what you need to do once your personal assistant starts work and how you manage them.

P3  Induction

P6  Supervision

P8  Day to day management

“I observe the people working for me and when we have quarterly reviews we talk about areas of improvement.”
Induction

Induction is about explaining what you want your personal assistant to do, as well as telling them about how you want things to be done and introducing them to your environment.

Proper induction will help your personal assistant to settle in quickly and can be the start of their continuing training and development. During the induction period you may also want to discuss training and look at how you can address any gaps in your PA's skills and knowledge to help them meet your needs. The booklet in this toolkit about training has more information.

Make a list of things you need to tell your new personal assistant on their first day. What do they need to know about the job, and how do they need to carry out their tasks in the best way for you? Decide what they need to know on their first day and what you will be happy for them to learn bit by bit.

Set aside time with your new personal assistant. You could do this before or on their first day.

Take time to think how you can best keep control – you are the boss and your personal assistant should work with you and at your pace.

Keep a simple record of how your personal assistant was inducted. If personal assistants feel that you are asking them to do something that is risky or that goes against what they have been trained to do, they have the right to say no.

Skills for Care has created the The Care Certificate to support employers with induction. These standards will help your personal assistant learn about their job and understand the way you want them to carry out their duties.

More information:  
www.skillsforcare.org.uk/PAinductions
Advice from **Being the Boss**

An ‘induction’ is a way of introducing a new personal assistant to your way of working and your way of life. The more effort that you put into getting the induction right, the more successful the relationship with your personal assistant is likely to be.
1. On the first day when they are working on their own:

- go over the contract again
- explain your house rules (if you have any). These may include items such as wearing slippers or indoor shoes, the use of your phone, eating arrangements, etc.
- explain where things are kept
- make time to sit with a cup of coffee/tea with your new personal assistant and explain about tea breaks, etc. and any recording they may need to do e.g. notes about their shift, notes about the finances etc.
- explain what might be happening on their next shift if it’s different to what they may expect (meetings, theatre, cinema, etc.)

2. Training before they start or before their first lone shift:

- where you can afford to do this, have a well-established personal assistant on the rota with them and get them to shadow their work.

3. One month after starting (dependent on their probationary period), have a supervision session. Provide the personal assistant with an agenda. Before this is going to happen tell your personal assistant about it so they can prepare as well. More information about supervision is included on page 6.

4. One month after this repeat the supervision session, and finally one month after this repeat again and make sure that what you want from your personal assistant is what you are getting. If you are happy with their work and your trial period is complete, tell the personal assistant this.

5. Inform the personal assistant that you will then conduct supervision regularly (at whatever times you agree together). If you feel there are issues you are not happy with you can always extend the trial period.

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*Being the Boss is a national organisation offering information and support to individual employers. More information is available at www.beingtheboss.co.uk.*
Supervision

It’s a good idea for you to formally meet with your personal assistant at set times, for example, once a month during trial periods and every three, six or 12 months afterwards, to talk about the job. This is called a performance review or supervision.

Carrying out a performance review (or supervision) with your personal assistant regularly will help you keep control.

Remember that performance reviews are a two-way discussion between you and your personal assistant, that:

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

You may want to consider doing supervision training yourself and/or teaming up with another employer in your area who may be able to support you with this.

**Getting support with supervision**

You might want to think about external supervision:

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

A good supervisor will balance the views of you and your personal assistant so you both see each other’s point of view.

If you wanted to use an external service to carry out supervision, it is a service that you will need to pay for. Your direct payment adviser, local support organisation or the organisation that provides any funding you receive may be able to help you find this type of service.

**Remember to keep a record of your meeting. This is particularly important if you have discussed poor performance.**

For more information about effective supervision go to [www.skillsforcare.org.uk/supervision](http://www.skillsforcare.org.uk/supervision)
Day to day management (or being a good employer)

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

- Give them the support and development they need
- Make sure they don’t have to make a choice between home and work
- Imagine yourself in their position
- Reward your personal assistant
- Manager Induction Standards
- Good communication
- Value and retain your personal assistant
- Clear boundaries
Day to day management

Manager Induction Standards (MIS)
Skills for Care has developed these standards for all employers, including anyone employing a personal assistant. They are designed to help you recognise and develop your management skills. For new employers they can help to build confidence and understanding; for more experienced employers they are a useful check and a way to think about what you are already doing.

More information:
www.skillsforcare.org.uk/mis
Contact Skills for Care for more information about training and qualifications for your personal assistant. For details of your local area contact visit www.skillsforcare.org.uk/areas or call 0113 245 1275

Valuing and retaining your personal assistant
If your personal assistants are happy in their work and fairly treated, they are more likely to stay with you. Things that can contribute are:

- make sure you are paying at least the ‘going rate’ (similar to what other employers are paying). Ideally people’s pay should also reflect their skills, qualifications and responsibilities
- you may choose to pay a higher rate to a worker who does extra or more difficult tasks
- there are other ways to show you value your staff as well as paying them appropriately; can you offer anything as well as basic pay? For example, extra holidays, support for training/qualifications and support for flexible working
- showing your staff respect and saying thank you is worth a lot.

Give them the support and development they need
A good induction, regular supervision/performance review and opportunities for training all help with keeping your personal assistant.
Make sure they don’t have to make a choice between home and work

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

Imagine yourself in their position

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

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

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

Do not just talk to your personal assistant when things go wrong: ensure they know that they are appreciated and that jobs well done are noticed.

If your personal assistant is unhappy in their work, do they feel they can tell you?

NOTE:

Being clear about what you need your personal assistant to do when you advertise the job, in their interview and induction, as well as during their probation period will help to avoid stress later on.
**Boundaries**

Boundaries and where people place these boundaries are different for each person.

Your relationship with your personal assistant may not be like more formal employer/employee relationships. Boundaries are often blurred, and the working agreement can be far more relaxed. Personal assistants can end up feeling more like friends than employees.

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

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

*Being a successful employer is a two way process*
Communication

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

People often use different languages or methods of communication. This can mean that you and your personal assistant have difficulties in understanding each other. As part of their induction, you need to tell your personal assistant about:

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

You may need to think about training for your personal assistant to develop the necessary communication skills. You should not employ a personal assistant unless you and they are confident that you can understand each other, or will be able to after training or instruction.
Preventing problems

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

You should always be careful with your money and savings.

**Looking after your money**

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

**Things you should not do**

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

It is important that you have an effective way of recording the hours that your personal assistant has worked and that these hours are linked to the correct rate of pay. Wages should always be paid on time and accurately. You always need to give your PA a payslip.
Different formats of this toolkit are available on request from Skills for Care.

Please email marketing@skillsforcare.org.uk or call 0113 245 1716