

# USING A SELF-ASSESSMENT IN FINDING THE RIGHT PERSONAL ASSISTANT

by: Ed Turner

## ◆ INTRODUCTION

Finding a qualified workplace personal assistant (PA) begins with the employee with a disability doing a self-assessment. The self-assessment will help identify the employee's support needs and will assist in determining the qualifications to look for when recruiting a workplace PA. Determining the qualifications for a workplace PA is most essential. The employee needs to know how well the PA applicant can perform the skills needed to assist in completing the job tasks. In recruiting a workplace PA, it is important for the employee to find someone who would be interested and capable of assisting in completing work tasks in the most efficient manner.

When an employee with a disability decides to request a workplace PA as a reasonable accommodation for employment, a self assessment becomes a valuable tool in negotiating with an employer for personal assistance services (PAS). The assessment will help determine the level of work-related PAS needed by the employee with a disability and will ultimately assist in finding the PA with the necessary skills.

## ◆ COMPLETING AN OBJECTIVE SELF-ASSESSMENT

The entire self-assessment process should be driven by the employee with the disability. The employee understands his/her own skills and abilities and can best determine what supports will work most effectively. When completing the self-assessment, the employee should consider three basic factors. First, what are the essential functions of the job and what are the most efficient ways to accomplish these functions? Second, which functions can be accomplished by using assistive technology? Thirdly, which functions can be best done through the assistance of another individual with the necessary skills?

In assessing ways to efficiently accomplish the essential functions of the job, employees should focus the self-assessment on what is needed to increase their productivity and effectiveness. For example, an employee who has limited finger dexterity would find word processing, filing, keeping

the workstation organized, and dialing the telephone difficult. This employee will probably want to recruit a PA who has good motor skills and basic filing skills to assist with these tasks. In this case, it is the employee with a disability who has the responsibility to know what needs to be written, how files should be setup, and how the workstation needs to be organized.

In most cases, employees with disabilities will know their skills, abilities, and support needs. However, it may be advisable to consult with a rehabilitation engineer, vocational professional, Employment Specialist, or the job-site supervisor to make sure all support needs are addressed in the self-assessment. If an employee feels intimidated by having these professionals involved in the self-assessment process, he/she can get a friend to serve as a mentor in this process. Having the support of a mentor or friend is a best practice for ensuring all support needs have been addressed. Nevertheless, it is vital that the employee with a disability is in charge of the self-assessment process.

It is important that the employee and the individuals assisting with the self-assessment systematically identify workplace support needs. In researching material for this chapter, it was difficult to come up with an assessment instrument designed to measure the need for a workplace PA. Most instruments found have been developed for determining the need for assistance in the home setting. A simple checklist can serve as an effective assessment format. This checklist should include such factors as essential functions of the job, how those functions will be accomplished, any assistive devices that may assist in accomplishing these functions, tasks that require human assistance, and estimated times this type of assistance will be needed. For example, a training associate with a significant disability that affects his finger dexterity, coordination, and ability to verbally communicate has requested a workplace PA as a job accommodation. His employer has agreed to provide the services of a workplace PA to assist with job duty tasks. The table on the following page is an example of the checklist he used to justify his needs for a workplace PA. A self assessment checklist form for the reader's use is provided in Appendix 1 at the end of this Guide.

Using this checklist gives the employee with a disability a graphic picture of personal support needs and the accommodations that will best meet those needs. The checklist is also an effective tool in showing employers how the use of assistive technology and a workplace PA can help improve the employee's efficiency. In addition, the list can give the employee a clear picture of the skills needed by the PA. Having

### **SELF-ASSESSMENT CHECKLIST:**

- ✓ **Essential functions of the job;**
- ✓ **How functions will be accomplished;**
- ✓ **Assistive devices used;**
- ✓ **Tasks needing Personal Assistance; and**
- ✓ **Estimated time PAS needed.**

this picture in mind will enable the employee to develop a recruitment strategy and will help in identifying the best applicants for the workplace personal assistant position. The checklist can also be used by the employee in writing an ad to begin the process of recruiting the workplace PA. In addition, the same information can be used to describe the job description that will specifically outline the duties and responsibilities for a workplace personal assistant.

### Self-Assessment Checklist for a Training Associate

ESSENTIAL FUNCTION	HOW FUNCTION WILL BE ACCOMPLISHED	ASSISTIVE DEVICES USED	TASKS NEEDING PERSONAL ASSISTANCE	ESTIMATED PAS TIME NEEDED
Develop training materials, reports, related correspondence	Assistance from a workplace personal assistant	Appropriate computer software	Word processing skills in a timely manner	12 hrs wk.
Acquire speakers and coordinate trainings	Assistance from a workplace personal assistant	Telephone with speaker device	Assistance with dialing phone, recording dates, maintain phone data base	5 hrs wk.
Track training outcomes	Assistance from a workplace personal assistant	Appropriate computer software / telephone with speaker device	Assistance with dialing phone numbers	2 hrs wk.
Prepare and participate in presentations	Assistance from a workplace personal assistant	Appropriate computer software	Word processing, power point skills in a timely manner	3 hrs wk.
Represent company at national meetings	Assistance from a workplace personal assistant	Appropriate computer software	Word processing, personal grooming, travel assistance	As needed
Coordinate activities across various projects	Assistance from a workplace personal assistant	Appropriate computer software / telephone with speaker device	Word processing, power point skills in a timely manner	5 hrs wk.
Necessary systems advocacy	Assistance from a workplace personal assistant	Appropriate computer software / telephone with speaker device	Word processing, power point skills in a timely manner	As needed

## ◆ RECRUITING A WORKPLACE PERSONAL ASSISTANT

The recruitment process involves developing an effective ad, screening appropriate applicants, using effective interviewing techniques, and weighing all the factors before making a final selection. Once again, the employee needs to be in charge of this process. In writing the recruitment ad, the employee should give basic information such as the type of job, a brief explanation of needed skills, and that the applicant will be working for a person with a disability. At this initial stage, it is not important for the employee to give specifics about his/her disability.

The objective of the ad is to find the most qualified person for the job. The ad should be concise with no more than fifty words and be placed in strategic locations and/or publications to attract qualified applicants. For example, an employee working in an academic environment should target recruitment efforts to people who have the necessary skills required in an academic setting. Some likely locations to post the ad might be on bulletin boards around campus or in newsletters which are read by both faculty and students. Other employees who are in different careers can look at their own workplace environments and determine where to post the ad to receive high readership. The table below contains suggestions on where to post an ad for a PA. Additional suggestions for recruiting a workplace PA are presented in Chapter 3.

### Options for PA Recruitment Ads

Advertise in local newspapers.



Call a local Center for Independent Living and see if they maintain a registry of personal assistants.

Advertise by “word-of-mouth”.



Tell co-workers you are seeking a personal assistant.

Tell friends you are looking.

Check with local churches or service clubs.

Advertise in the local high schools, colleges, and universities.



Check out the “want-ads” in local newspapers

Look in the Yellow-pages of your local phonebook for home care services.



Check with health care profession schools for students who are seeking practical experience.

Check with local colleges for business interns interested in serving as personal assistants while learning about the business.



Advertise in a business newsletter

As soon as enough applications for the position are received, the employee should begin the screening process. Usually, the initial screening is handled by the employee, and no representative from the company's management or human resource area needs to be involved. However, the employee should make certain there is no company or agency policy to the contrary. Also, the employee should check to see if the employment entity has a policy requiring the workplace PA to fill out an employment application. This is a recommended procedure for best practice.

Most often, the initial screening is conducted by phone by the employee with a disability. By asking a few basic questions, the employee can determine which applicants have the basic skills to merit a face-to-face interview. At this stage, the employee should focus on applicants who have the necessary skills to assist in performing the essential functions of the job. For example, if the employee's job involves word processing, data entry, and other clerical tasks, applicants should be quizzed as to their proficiency in these areas. Hopefully, during this initial screening process, two or three applicants will be determined to have the necessary skills to meet the employee's basic support needs. If so, the employee can then move to the next stage, which is interviewing finalists to become a workplace personal assistant.

## ◆ INTERVIEWING APPLICANTS

In interviewing applicants, the employee with a disability should be the primary person conducting the interview with two or three other team members. The employee should develop between five and seven questions to ask prior to the interview. The employee can use the job description to come up with the interview questions. An example job description for a workplace PA is contained in Appendix 2 of this guide. The questions should evolve around skills needed, the employee's personal preferences in how tasks are to be accomplished, and the applicant's experience in a work environment. At least one question should be designed in such a way as to gain an understanding of the applicant's feeling about working with and for an employee with a disability. The way the applicant responds to this question should be a determining factor in giving the applicant further consideration. No matter how skilled or unskilled the person may appear to be, if the applicant is having a problem relating to working for an employee with a disability,

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the employment relationship will not work. Sometimes it might be better to give a person who has less skills more consideration if the individual has a positive attitude about working for a person with a disability. A person can always be trained in the appropriate work skills, but it will be difficult to change negative attitudes.

It is recommended that the interview be held in the employee's work environment. If the employee decides to do a skills test using a word processor or other types of equipment, it can be incorporated into the interview process with no difficulty. Also, with the interview being conducted at the workplace, it gives the employee an opportunity to observe the applicant's behavior and mannerisms. The employee can also observe the applicant's dress attire, which may be another consideration in some work environments. After interviewing all perspective applicants, the employee should have a good idea which applicant is the best candidate for becoming a workplace PA.

## ◆ **HIRING THE WORKPLACE PERSONAL ASSISTANT** —————

Once the interviews are completed, if the supervisor was not part of the interview team, the employee should consult with the immediate supervisor at the job site before making the job offer. This supervisor will be interacting with the workplace PA and, therefore, this consultation is only a common courtesy. All hiring decisions should be in writing indicating why the candidate was selected. This paperwork should be shared with the supervisor to promote a good working relationship among all concerned.

Following a positive interview, the employee should wait 24 hours before making a job offer to the successful applicant. This allows the employee time to mull over everything that was said during the interview and perhaps raise some new questions that need to be asked prior to hiring the applicant. It also gives the company time to check out the applicant's past work history, references, and background.

Once the employee is comfortable with the final decision, the job offer is now ready to be made. The offer can be made over the telephone. However, a pre-employment meeting should be scheduled to clarify final details and to iron out any problems or concerns either person may have. This meeting may also produce a written document that can be called "an employment agreement or contract". This agreement should outline the workplace PA's responsibilities and the employee's obligations to that person. It should also stipulate how the salary will

be paid and when. This is especially important if the employee plans to pay a portion of that salary in addition to what the employer will pay. The agreement should also list the terms of employment such as vacation days, sick days, quarterly or semiannual performance evaluations, reasons for immediate termination, and causes for lay-offs. Once this agreement is developed, it needs to be reviewed, agreed to, and signed by both the employee, the workplace PA and the employer.

The performance evaluation is a very important tool that gives the employee an opportunity to identify any modifications or additions to the support plan. The evaluation also gives the workplace PA the opportunity to cite any needs for additional training based on the changing support needs of the employee. The evaluation provides the opportunity to share problems or concerns either may be having. The evaluation should not be used as an instrument to discipline but rather a gage to be used to improve the working relationship.

The performance evaluation can be a part of the employment agreement. An example of an employment agreement for a workplace PA is found in the Appendix.

## ◆ SUMMARY

This chapter contains a blueprint to assist the employee with a disability find the most qualified workplace personal assistant. As noted, the whole process needs to be driven by the employee who will be using this vital support. However, during the initial stage of completing the self-assessment, the employee should seriously consider seeking the advice of the most appropriate rehabilitation professional to make certain all support needs are being addressed. It is the self-assessment that will determine the needed qualifications of the applicants who will be recruited to become the employee's workplace personal assistant. The employee should have the final decision on the selection of qualified candidates to serve as a workplace PA.

