

# KEYS TO BEING AN EFFECTIVE WORKPLACE PERSONAL ASSISTANT

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Personal assistants (PAs) and their ability to effectively provide essential supports at the workplace are extremely important to the employment success for employees with a disability who utilize personal assistant services (PAS). Employees with disabilities who use PAS to live successfully in the community need similar supports at work. The expansion of the use of PAS at the workplace has created a unique set of challenges for PAs because there are tremendous differences between providing this type of support in a business environment as compared to a home environment. These potential differences between the home and the workplace involve both the wide variety of potential work-related personal assistance services that the PA may provide, as well as and also changes in the relationship between the PA and the employee with a disability receiving PAS.

For example, there is usually less formality in the home environment than may be required in a business setting. A good workplace PA must recognize and understand the role differences across settings and adapt accordingly. Almost always in the workplace setting, the PA will be directed by the employee with a disability and employer instead of a professional home health care agency. This shift in supervision will be a big difference for PAs who have only provided PAS through an agency and have been accountable primarily to that agency.

This chapter will describe some “do’s and don’ts” that a workplace PA should adhere to when providing support in the workplace. It will address some of the particular requirements and expectations for the PA to work effectively within the workplace culture, including how to assist the employee with a disability receiving PA support meet job performance demands. It will review attributes and competencies of an effective workplace PA. Finally, the chapter will offer suggestions on how the PA can remain unobtrusive while providing the level of support needed by the employee, perhaps the most important attribute of a good PA in the workplace.

Providing PA services in the workplace can be a new and exciting career opportunity. Workplace PAs can have the satisfaction of assisting a person with a significant disability be successful on the job while also learning valuable new skills that will enhance their own employability. These skills can range from simple tasks, such as arranging the work site to facili-

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tate the productivity of an entry level employee, to more complex tasks involved in assisting a college researcher. Having the opportunity to learn different skills will make being a workplace PA an exciting and rewarding career in the new millennium.

There are both obvious and subtle differences between providing PAS in a business environment and providing it in the home. In the workplace, the relationship between the PA and the employee must be more formal in nature than in the home setting. Here are some best practice examples that workplace PAs should follow when providing on-the-job support.

- ▶ **Ask the employee about workplace dress codes and other pertinent rules or regulations. The Personal Assistant should dress and act in a manner fitting to the work environment.**
- ▶ **Do not exhibit any inappropriate behavior that will reflect negatively on the employee receiving your support. Do not get involved in conflicts that may be occurring between the employee and co-workers or among the co-workers. Do not participate in any conversations that may involve gossip about the employee you are supporting.**
- ▶ **Do not discuss services personal in nature with other co-workers or the employee's supervisor. This would be a breach of confidentiality, which is the quickest way for the Personal Assistant to lose credibility with the employee. Once the Personal Assistant has lost the employee's trust it will be difficult to regain, and could lead to the PAs' employment being terminated.**

### **DEALING WITH DISTRACTIONS AT THE WORKPLACE**

There are many distractions in a workplace environment that do not exist in the home setting. Unlike the home environment, the workplace is filled with different personalities that may cause a PA to lose focus on workplace duties. These distracting personalities may include the employee's co-workers and supervisors. For example, a very loud and talkative co-worker trying to drum up a conversation with a person near to where the PA is working can be very distracting. A supervisor who tries to give the PA other duties not directly involved in providing PAS can also be very distracting. Other distractions at the work place might include multi-cubicle work stations, sharing an office with another employee, noisy environments, or stressful situations.

Examples of stressful situations include jobs that have short deadlines, fast-paced jobs, constantly changing priorities, and/or short-notice business trips where travel arrangements and needed accommodations must be planned quickly. These distractions can result in a loss of privacy in the provision of PAS, a breakdown in effective PAS routines, a temporary change in PA support needs, and a need to adjust the provision of PAS to unfamiliar locations and situations. A resourceful workplace PA will constantly strive to assure that these and other distractions do not interfere with providing effective PAS.

### ***MAINTAINING PROFESSIONAL RELATIONSHIPS***

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Personal assistants must recognize the importance of maintaining a professional relationship with the employee and employee's supervisor while in the workplace. In most situations with the employee/PA relationship, the employee with a disability is the PA's primary supervisor. The PA has a primary responsibility to support and report directly to the employee with a disability. The PA should avoid becoming a "go-for" person for other employees and/or the employee's supervisor. Although the compliant "go-for" role might make the PA popular around the office, it will interfere with the PA effectively performing his/her primary duties, thus causing a loss of the productivity by the employee with a disability. In situations where the PA feels that the duties being assigned or requests being made by co-workers and/or a supervisor distract from the effective provision of PAS, the PA should let the person she/he supports know of the problem. The final responsibility for resolving this type of job interference lies with the employee with a disability.

### ***ESTABLISHING AN EFFECTIVE WORK ROUTINE***

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Workplace PAs should follow common sense approaches to providing PAS in the workplace. For example, when the employee pauses to chat with colleagues, it is alright for the PA to interact and be friendly with other co-workers. However, when the employee is ready to resume the job tasks of the day, the PA must get back to supporting that person. It is really important for the PA to negotiate with the employee about times when support is not needed and then schedule personal breaks accordingly. For example, perhaps the employee makes telephone calls during certain times of the day and may not need PAS at those times, thus providing an excellent opportunity for the PA to take a personal break. Knowing the best times to take breaks will come as the relationship develops and the PA learns the employee's work routine.

An effective workplace PA understands fully the support needs of the employee being assisted, can adapt to routines and various personalities in the work environment, and can keep focus on whatever task the employee is involved in despite multiple distractions. To be effective, the workplace PA should be familiar with the employee's job tasks and production requirements in terms of quantity, quality, and timeliness of outputs. There are a number of personal attributes that are key to being an effective workplace PA. These attributes are highlighted in the next Section.

## ◆ ATTRIBUTES & COMPETENCIES OF AN EFFECTIVE WORKPLACE PERSONAL ASSISTANT

### ***ATTRIBUTES***

**Five core attributes of an effective workplace PA are reliability, punctuality, loyalty, honesty, and a commitment to effective communication with the employee receiving support. All are the building blocks of a successful long-term employee/PA relationship.**

Five core attributes of an effective workplace PA are reliability, punctuality, loyalty, honesty, and a commitment to effective communication with the employee receiving support. All are the building blocks of a successful long-term employee/PA relationship. It is very important for the employee with a disability to know that the PA's support will be readily available at the time it is needed. A good workplace PA understands that the employee relies on the PA to get the job done in a timely and reliable manner. Being on the job at the appointed time is a must for the workplace PA.

Loyalty to the employee is another key attribute of a good workplace PA. Showing loyalty may include the PA's willingness to stay late on occasion to assist the employee complete a job that may have an immediate due date. Maintaining loyalty by avoiding doing anything that might cause the employee to question the PA's faithfulness is key to building a long-term working relationship. Also, PA being honest with the employee will make the relationship stronger. Demonstrating a commitment to reliability, punctuality, loyalty, and honesty will increase the PA's value to both the employee and the employer. These attributes will not only assure a long-term successful working relationship for the PA with the employee, but also will increase the Personal Assistant's overall value to the entire organization. It is important to remember that the longer the relationship, the more the PA's salary is likely to increase over time.

Clear communication is another essential attribute for a good working relationship between the employee and the workplace PA. Effective communication requires a commitment to a two-way exchange of

information. For example, even though it is the responsibility of the employee to provide guidance to the PA about how tasks should be done, the PA should make certain that the employee's instructions are understood. The PA should never assume that he/she knows the best way to provide support or understands the employee's wishes. Making assumptions can lead to problems for both the PA and the employee. The PA must remember that the employee is responsible for the outcome of tasks to be performed on-the-job and should clarify any unclear instructions before proceeding with a support task. In more long-term relationships, the PA learns to understand what needs to be done without always being told. An experienced PA can work independently sometimes (such as setting-up the work area for a upcoming task, for example) while the employee is elsewhere or involved in another activity.

Commitment to reliability, punctuality, loyalty, honesty, and clear communication are the qualities of an effective workplace PA. These attributes will facilitate the development of a good working relationship between the PA and the employee.

### **PERFORMANCE AREAS**

The workplace Personal Assistant must have skills necessary to assist the employee receiving support to complete job tasks. For example, if the employee has a job involving the development of correspondence, training materials, and/or other documents, the PA should possess some knowledge of basic letter writing and word processing. If the PA is supporting a person with a visual impairment, the PA's ability to read competently is extremely important. When supporting a person with a hearing impairment, the PA should know sign language in order to communicate with the employee and to assist him/her in communicating with the supervisor and other co-workers. If the PA is supporting an employee with a cognitive disability, good judgement and decision-making skills are needed in helping the employee make good decisions. A good example of a PA prompt for an employee with a cognitive disability to accommodate possible memory challenges is a suggestion five minutes before the close of the work day that it is time to clean up the work space and set it up for the first task of the next work day. However, no matter what the disability of the employee receiving support, the PA should treat that individual as his/her supervisor.

It is very important that a PA be honest with the employee about the skills and knowledge he/she has or does not have. In most cases, the employee is looking for good attributes such as reliability and de-

pendability from a PA and will make sure the PA receives the necessary training for job specific tasks. However, the workplace PA should have a basic set of skills in key performance areas that support the employee in completing core job tasks. PAs who are not truthful about their skills and abilities will not only potentially lose their job, they may also cause the employee's job loss as well and can cause employers to take a dim view of future requests for PAS as a workplace accommodation.

A summary presentation of core attributes and performance areas of an effective workplace PA are listed in the Table below.

**◆ TABLE 1 -- WORKPLACE PERSONAL ASSISTANT COMPETENCIES & ATTRIBUTES —**

<b>Performance Areas</b>	<b>Description</b>	<b>Attributes</b>
<b><i>HAS NECESSARY SKILLS</i></b>	Has skills to perform necessary job tasks	<u>Punctual</u> -- will always be on time
<b><i>KNOWS HOW TO BE UNOBTRUSIVE ON THE JOB</i></b>	Provides necessary support without drawing attention to his/her self	<u>Dependable &amp; Reliable</u> -- will always show up for work
<b><i>IS PROFESSIONAL AT ALL TIMES</i></b>	Exhibits professional behavior at all times and remains focused on the tasks of the employee	<u>Right Personality &amp; Temperament</u> -- is content to provide support in background without sharing spotlight
<b><i>KEEPS CONFIDENTIALITY</i></b>	Never discusses personal issues of the employee with others	<u>Loyalty</u> -- is loyal to the employee and respects him/her
<b><i>KNOWS WHAT TO DO WITHOUT SUPERVISION</i></b>	Can follow through on certain tasks while employee is in meetings	<u>Team Player</u> -- will do whatever is necessary to help the employee get the job done
<b><i>WILLING TO BE TRAINED TO DO NEW TASKS</i></b>	Is eager to learn new things as employee's responsibilities change	<u>Highly Focused</u> -- does not let other things distract him/her
<b><i>HAS A GENERAL KNOWLEDGE OF DIFFERENT DISABILITIES</i></b>	Knows what employee might expect	<u>Patience</u> -- has the ability to take time to listen and take direction from the employee
<b><i>WILLING TO BE FLEXIBLE</i></b>	Can change from one task to another as the employee's priorities change; can adapt to employee's working schedule	<u>Honest</u> -- Will let employee know problems with doing particular jobs

## ***THE IMPORTANCE OF THE PERSONAL ASSISTANT BEING UNOBTUSIVE IN THE WORKPLACE***

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Providing PAS as a workplace support places the Personal Assistant in a relatively new public situation as compared to the more familiar home environment. Therefore, it is important to focus on the PA remaining unobtrusive while providing supports as a key attribute of an effective workplace PA. An unobtrusive PA almost fades into the background, leaving the employee as the focal point and leaving no confusion about who is getting the job done. Maintaining focus on the employee, not the PA, sends a positive message to co-workers and supervisors and reduces the chances that possible conflicts will develop between the employee and the PA. The ability to achieve this level of unobtrusiveness takes real skill and attention on the part of the workplace PA.

In a workplace PAS situation, some co-workers and supervisors may have the misconception that two people are doing the same job. The workplace PA must help prevent this misconception, which can become a problem for the PA and the employee. For example, the PA should avoid becoming involved when the employee is having a discussion with the supervisor about how a particular job task needs to be done, unless the employee requests input. After the discussion is over and the supervisor has left, it is very appropriate for the PA to offer suggestions to the employee in private. This approach also keeps the PA from being put in the middle of awkward situations and encourages the supervisor to deal directly with the employee who has a disability. If the supervisor tries to solicit the PA's input directly, the PA should politely remind the supervisor that she/he is there to support the preferences of the person with the disability and should defer to the judgment of that individual. These tips will facilitate the workplace PA remaining unobtrusive while earning the respect of the employee, co-workers, and supervisors.

### **◆ SUMMARY**

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In time, the use of PAS at the workplace will increase substantially employment opportunities for private PAS providers. However, it is critically important that Personal Assistants adjust to the unique requirements of different business environments. Workplace PAs must have a high self-esteem and know their value to the employee without needing the gratification of sharing the spotlight. This willingness to remain in the background takes a unique and unselfish person who is

very comfortable in a supporting role and is gratified by the success of the employee. It comes in-part from the PA establishing a very good working relationship with the employee with a disability.

As the new economy seeks to fill critical labor shortages, it is becoming quite apparent that the role of a PA in the workplace will become just as vital to a person with a significant disability as providing PA support in the home. Over the next decade, the refinement and recognition of the critical supports provided by the workplace PA will add a new dimension to addressing the employment support needs and expanding the employment opportunities of many individuals with a disability. It will also expand the work experiences, skills, and potential job satisfaction of PAs. My own experience as a workplace PA is both rewarding and very fulfilling. I have had the opportunity to travel and participate in national conferences, and I have received training and gained valuable experience in how to better support my employer on his job. The opportunity to provide PAS at the workplace is a mutually beneficial experience for both my employer and myself.