

sample job description and person specification

Job title: Personal Assistant (PA)

Reporting to: (Your name)

Location: Home care in the (do not put your address but the area where your home is located) area.

Nature of the job role: To assist with a variety of tasks which will support the employer to live an independent personal and social life.

Main Duties:

Personal duties (add the tasks from your list – see page 2)

Domestic duties (add the tasks from your list – see page 2)

Social Duties (add the tasks from your list – see page 2)

These duties may vary from day to day.

Any other reasonable duties that may be necessary.

Hours of work: (List the days and hours of work – you can add ‘flexible hours to be mutually agreed’ if you choose)

Rate of Pay: (If the hours include evenings, sleepovers or weekends, list the different rates of pay e.g. weekdays - £8.00 per hour, sleepover - £37.80)

Qualifications and Experience:

Essential: (List the essential qualifications and experience you need your employee to have: e.g. driving licence, car and appropriate insurance, knowledge of a particular language or culture, able to swim, nursing qualification.)

Preferred: (List the qualifications and experience you would like your employee to have e.g. computer literate, good communicator, likes dogs, experience of this type of work.)

blank job description and person specification

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Location:

Nature of the job role:

Main Duties:

Personal duties:

Domestic duties:

Social Duties:

Hours of work:

Rate of Pay:

Qualifications and Experience:

Essential:

Preferred:

sample job adverts

Personal Assistant Required

Personal assistant required to care for a disabled young man in his home from 2.45pm Saturday through to 2.45pm Sunday. Duties to include a sleeping night and a waking night on alternate Saturdays.

Applicants must have held a clean driving licence for at least one year and be over 21 years of age, as duties include driving specialised transport.

The rate of pay will be around £9.00 per hour.

Successful applicants are required to provide an enhanced disclosure. Disclosure expense will be met by employer.

Please write with CV to S. Holmes, PO BOX 221b, London BS 18 E59. Closing date for applications is 3 January 2009.

P/Time Personal Assistant

Personal Assistant to assist 27 year old disabled mother of two with daily tasks. Main duties will include cleaning; ironing; assisting on outings like walking the dog; socialising with children in and out of the home; escorting children to and from school.

Applicant must have experience of dogs and must have sound experience of working with children aged 7 and 8. Knowledge/experience of Fibromyalgia/ME desirable but not essential. Successful applicant will be subject to full CRB check (paid for by employer).

Will work up to 20 hours per week between 8.30am and 6.30pm Mon-Fri with occasional weekend work. Wage to be arranged – will be approx £7.00 per hour.

Please email CV with cover note to a.nother08@btinternet.com or fill in Job Centre application form.

sample job application form

surname (block letters):

other names:

address:

telephone:

education and training

details and results of any examinations taken:

further education (e.g. technical college, evening classes):

any craft or other training:

employment history

1. present employer address:

job title:

duties:

rate of pay:

date employed from:

to:

No approach will be made to your present employer before an offer of employment is made to you.

Please tell me about other jobs you have done and about the skills you used and/or learned in those jobs:

Please tell me why you have applied for this post and give examples of things you have done that make you particularly suited to the job:

Have you ever been convicted of a criminal offence? YES / NO
(declaration subject to the Rehabilitation of Offenders Act 1974)

If you have a disability please tell me about any adjustments I may need to make to assist you at interview:

Please tell me if there are any dates when you will not be available for interview:

I can confirm that to the best of my knowledge the above information is correct. I accept that providing deliberately false information could result in my dismissal.

signature

date

interview checklist and sample interview questions

interview checklist

- Arrange a venue.
- Think about a trial run; interviewing is just as stressful as being interviewed.
- If required, arrange assistance with interviewing.
- List interview questions.
- Plan the length of interview.
- Think about how formal or informal you want to make it.
- Prepare information to conclude the interview

questions

An interview is an exchange of information, therefore, it is important to listen and give the person a chance to speak and ask clear questions.

Don't assume anything, whether in terms of giving or getting information.

interview questions – choose a few from the following list and add your own:

- Do you have any questions about the job description?
- I see that you don't have direct experience of this kind of work, but people often have other experience. For example, some people have members of their family, or friends, or maybe neighbours who are disabled in one way or another. What experience of working with disabled people do you have?
- If you were out with me and someone persisted in ignoring me and spoke only to you, how would you react?
- I will need to tell you how to do things in the way I want them done. How do you think you would cope with this?
- How would you react if you have done something and I want it done again in another way?
- What if I ask you to do something, and you think there is another way to do it that you would prefer – what would you do?
- If we did have a difference of opinion, how do you think you would deal with this?

- What qualities and experience do you have that you think would make you a good personal assistant?
- Would you be interested if there is any training available?
- Have you been on any relevant training courses? If so, what and when?
- Would you be prepared to consider being called on at short notice to do more than your usual hours, e.g. if another personal assistant goes off sick?
- What shifts would you prefer, e.g. days, nights or a mixture?
- What are your hobbies/interests?
- Do you have a car? Would you be prepared to use it for work?
- Would you be prepared to consider part-time or relief work?
- Any questions you'd like to ask me?

If you have pets you might want to mention them. Some people have allergies and could not work with pets.

If relevant you should ask why they are leaving, or have left, their current or last job. You should mention any other things you enjoy doing such as gardening, socialising and ask if the personal assistant would be prepared to do this as part of their job.

concluding the interview

You should also explain the following:

- Pay and conditions and any rota system you have worked out in advance.
- Contract of employment.
- When/how they will hear if they have been successful or not.
- That you will take up references for them before appointment.
- Tell them that if they are successful relevant Criminal Records Bureau (CRB) checks may be carried out before they can start work. Ask the Direct Payment Support Service for clarification.

sample letter inviting people for an interview

Your name
c/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of applicant

Address of applicant

Dear *(applicant's name)*

Personal Assistant position

Further to your application for the position of Personal Assistant, I would be delighted if you could attend an interview on *(date)* at *(time)* at *(address)*.

Please write to the above address to confirm that you are able to attend.

(You may want to include a map for the location of the interview.)

(If you are paying people's interview expenses put the details here.)

I look forward to seeing you.

Yours sincerely,

(Your name)

* Use the return address you used for applications (see page 3), not your own address

sample letter telling people they've not got an interview

Your name
c/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of applicant

Address of applicant

Dear *(applicant's name)*

Personal Assistant position

Further to your application for the position of Personal Assistant, I regret to inform you that you have not been selected for interview on this occasion.

Thank you for your interest and taking the time to apply for the position.

Yours sincerely,

(Your name)

* Use the return address you used for applications (see page 3), not your own address

sample letter asking for a reference

Your Name
C/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of Referee
Address of Referee

Dear *(referee's name)*

RE: *(employee's name)*

The above named has applied for a position of Personal Assistant and has given your name as a referee.

I would be grateful if you would be kind enough to answer the following questions, along with any relevant additional comments that you may care to offer, and return in the enclosed stamped addressed envelope.

- Has this person experience relating to the enclosed job description within their current role with you?
- How reliable has this person been whilst working for you?
- What periods of sick leave has this person had and what were the reasons?

May I take this opportunity to thank you for your co-operation and assure you that this information will be treated in the strictest confidence.

Yours sincerely,

(Your name)

* Use the return address you used for applications (see page 3), not your own address

sample letter offering the job

Your name
c/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of Applicant

Address of Applicant

Dear *(applicant's name)*

Offer of employment

Further to your recent interview, I am pleased to be able to confirm the following offer of employment, subject to satisfactory references.

| | |
|---------------------|--------------------------------------|
| job title | Personal Assistant |
| hours of work | <i>(insert hours of work)</i> |
| annual leave | <i>(insert number of days/hours)</i> |
| probationary period | <i>(insert number of weeks)</i> |
| salary | <i>(insert salary)</i> |
| start date | <i>(insert start)</i> |

I would be grateful if you could confirm your acceptance in writing or by phone.

Yours sincerely,

(Your name)

* Use the return address you used for applications (see page 3), not your own address

sample letter turning down an applicant

Your Name
C/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of Interviewee
Address of Interviewee

Dear *(interviewee's name)*

With regards to the interview held on *(date)* for the position of Personal Assistant, I regret to inform you that you have not been successful on this occasion.

(If you are offering people feedback on why they didn't get the job, say so here and give details as to how they can contact you.)

Thank you for taking the time to make your application and attend the interview and I hope you find a suitable position in the near future.

Yours sincerely,

(Your name)

* Use the return address you used for applications (see page 3), not your own address

list of documents to prove the legal right to work in the UK

working in the UK – document checklist

To prove they are eligible to work in the UK, workers need to provide one of the following documents:

- A pay slip from previous employment in the United Kingdom.
- A P60 or a P45.
- A National Insurance card.
- A British or European passport.
- A Birth Certificate confirming that they were born in the UK or the Republic of Ireland.
- A letter from the Home Office confirming that they have a legal right to work in the United Kingdom.

sample contract of employment

statement of main terms and conditions of employment

Employer's name:

Employee's name:

Date of commencement of employment:

Main place of work: *(insert your address)*

Job title: Personal Assistant

Duties and responsibilities:

As set out in the job description. The employer may require you to carry out other reasonable duties as required.

Probationary period:

There will be a probationary period of (**usually three months*). At the end of this period the position will be reviewed and if satisfactory the continuation of your employment will be confirmed. During the probationary period either party can terminate employment by giving one week's notice.

Hours of work:

Your hours of work will be

(Insert number of hours) weekday hours

(Insert number of hours) weekend hours

(Insert number of sleepovers if required) sleepover(s)

There is a need for the employee to be flexible and these hours may be changed as required according to the employer's needs. Under these circumstances, where hours need to be changed or additional hours worked, the employer will give as much notice as possible.

Lateness:

If you are going to be more than 10 minutes late you are required to contact the employer as soon as possible but at the very latest 30 minutes before you are due to start work

Salary:

As an hourly paid employee, your salary will be £(*insert weekday hourly rate before NIC or Tax deductions*) for weekdays, £(*insert weekend hourly rate before National Insurance Contributions and Tax deductions*) for weekends and bank holidays and £(*insert rate for sleepover before National Insurance Contributions and Tax deductions*) for sleepovers. Your salary is payable (*insert either monthly or weekly*) and will be paid on (*insert date of salary payment. If monthly it could be the third working day of the month or last Friday in the month for example. If weekly insert day of payment*) by (*insert direct payment into your bank/cheque/cash*).

The employer will deduct National Insurance and Income Tax as required by law. The employer may also deduct any overpayment of wages or holiday entitlement.

Pensions:

There is no pension scheme available with employer's contributions however if you are eligible you may be offered access to a Stakeholder Pension scheme.

Time sheets:

You will be required to complete a (*insert either monthly / weekly depending on payment of salary*) signed time sheet and submit this to the employer on (*insert day of the month or week giving time to work out wages or send to payroll agency to ensure wages can be paid on the given date*).

Holiday entitlement:

The holiday year is from (*insert holiday year – usually either 1st January – 31st December or 1st April – 31st March*). Your holiday entitlement must be taken during this period. Payment will not be made for any unused holiday and these cannot be taken into the next holiday period.

The full amount of your holiday entitlement is (*insert number of weeks and days – 5.6 days is the minimum legal requirement*) per year pro-rata per completed months employment. One week being the equivalent of weekly hours worked.

Bank holidays may be booked as holidays or will be paid at the weekend rate.

Holidays must be agreed with the employer at least (insert how many weeks – four weeks is usual) in advance. You may not take more than (insert number of days – 10 days is the usual) working days consecutively without the employer's prior written consent.

Should you leave employment and you have exceeded your holiday entitlement then this will be deducted from your final pay packet. If holiday entitlement is owed you will be paid for the outstanding entitlement.

(Take out if this is not appropriate) If it is agreed that you will accompany your employer on holidays as part of the required support, this time will be counted as working hours and you will not be expected to use your holiday entitlement.

Sick leave:

If you are ill and unable to attend work you should inform your employer as soon as possible to enable other arrangements to be made.

You will be entitled to Statutory Sick Pay (SSP) on production of an Employee's Statement of Sickness (form SC2) which must be completed for sick leave of more than three days or a medical certificate for sick leave of more than seven days. These forms must be sent directly to your employer.

Termination of employment:

During the probationary period either party requires one week's notice.

Up to two years of continuous employment you will be given one week's notice.

After two years continuous service you will be given one additional week's notice for each completed year up to a maximum of 12 weeks' notice.

After satisfactory completion of your probationary period you are required to give *(insert one month or four weeks')* notice in writing irrespective of length of service.

The employer reserves the right to pay your basic salary in lieu of notice instead of requesting that you work your notice period. In these circumstances you may not be employed by any other person or company whilst receiving pay in lieu of notice.

The employer reserves the right to dismiss you without notice in cases of serious breach of the terms of your employment, gross misconduct or gross negligence by you.

Confidentiality:

All information regarding the employer, the employer's family and the employer's domestic or personal circumstances is strictly confidential and cannot be discussed with a third party without the Employer's specific permission, or in an emergency situation.

The employer will hold personal information about you as personnel records. The employer will abide by the Data Protection act and disclose this information only to the relevant third parties e.g. HM Revenue and Customs.

Grievance procedure:

If you have a grievance you should comply with the grievance procedure. For more information contact ACAS on 08457 47 47 47 or see their Grievance procedure guidance on www.acas.gov.uk/index.aspx?articleid=820

Disciplinary procedures:

Minor problems will be dealt with and resolved informally.

In cases of more serious problems, depending on the seriousness of the breach of terms and conditions of contract or conduct and performances of your duties, one of the following disciplinary actions may be taken.

- A verbal warning which will be confirmed to you in writing and recorded in your personnel file for a period of *(six months is usual, but you must specify)*.
- A first written warning, which will be confirmed to you in writing and recorded in your personnel file for a period of *(12 months is usual, but you must specify)*.
- A final warning which would be confirmed to you in writing advising that further misconduct could lead to dismissal and recorded in your personnel file for a period of *(12 months is usual, but you must specify)*.

Dismissal:

In case of gross misconduct there will be no period of notice given. If you are in your probationary period or first year of employment, only one warning is required before dismissal.

Before any of these actions are taken you will receive a letter setting out the details of the alleged misconduct and inviting you to a meeting to discuss the matter. You will have the right to be accompanied to the meeting by a work colleague or a trade union representative. After the meeting you will be informed if any further action will be taken. You have the right to appeal but must do so within 10 working days of receipt of the notification of the decision.

sample safety in the home checklist

safety in the home checklist

Checklist procedure:

- The checklist should be completed annually.
- The checklist will also require completion each time there is a change to the environment.

Name:

Home address:

Date checklist complete:

| | satisfactory yes/no | comments / actions required |
|--|------------------------|--------------------------------|
| Are doorways clear of obstacles? | | |
| Do staircases have clear and easy access at all times? | | |
| Are there any loose carpets on floors or staircases? | | |
| Are there any overloaded sockets? | | |
| Is there adequate ventilation? | | |
| Is the heating adequate and controllable? | | |
| Is lighting adequate? | | |
| Is there any equipment that does not function properly? | | |
| Any trailing or damaged flexes? | | |
| Any damaged sockets? | | |
| Does your personal assistant use visual display equipment? | | |
| Do you have suitable and accessible fire-fighting equipment? | | |
| Has it been serviced within the last year? | | |
| Does your personal assistant have adequate space to complete their work? | | |
| Will your PA have to excessively stretch or bend to complete tasks? | | |
| Do you and your personal assistant have all the emergency contact numbers you require? | | |

Signed:

Step 1
What are the hazards?

- Spot hazards by:
- Looking at your 'safety in the home' checklist.
 - Visiting the 'your industry' area of the HSE website or calling the HSE infoline.
 - Calling the Workplace Health Connect AdviceLine or visiting their website.
 - Checking manufacturer's instructions
 - Contacting your Direct Payment Support Service.

Step 2
Who might be harmed and how?

- Identify possible people. Remember:
- some workers have particular needs.
 - people who may not be in your home all the time.
 - visitors.
 - think about how your work affects others present.
- See how the hazard could cause harm.

Step 3
What are you already doing? What further action is necessary?

- List what is already in place to reduce the likelihood of harm or make any harm less serious
- You need to make sure that you have reduced risks 'so far as is practicable'. List what more needs to be done.

Step 4
How will you put the assessment into action?

- Remember to prioritise. Deal with those hazards that are high-risk and have serious consequences first.

sample risk assessment

Step 5

Review date:

- Review your assessment to make sure you are still improving, or at least not sliding back.
- If there is a significant change in your home, remember to check your risk assessment and, where necessary, amend it.

sample disciplinary form

1. Purpose of the policy

The aim of this policy is to support good conduct and performance. This policy sets out the action which will be taken when disciplinary rules are breached.

(Guidance Notes 1: The purpose should remind people that the policy is not designed as a dismissal procedure, but as a means of encouraging personal assistants to meet a good standard.)

2. Principles

If you are subject to disciplinary action:

- the procedure is designed to establish the facts quickly and to deal consistently with disciplinary issues. No disciplinary action will be taken until the matter has been fully investigated.
- at every stage you will be advised of the nature of the complaint, be given the opportunity to state your case, and to be represented or accompanied by an advocate of your choice (this could be a fellow employee, a union representative or a friend).
- you will not be dismissed for a first breach of discipline except in the case of gross misconduct, when the penalty will normally be dismissal without notice and without pay in lieu of notice.
- you have a right to appeal against any disciplinary action taken against you.

(Guidance Notes 2: Employers often lose at employment tribunals because they did not comply with the procedure – so always follow the procedure.)

3. Informal discussions

Before taking formal disciplinary action, I will make every effort to resolve the matter by informal discussions with you. Only where this fails to bring about the desired improvement will the formal disciplinary procedure be implemented.

(Guidance Notes 3: Make sure that personal assistants understand the difference between a routine complaint and action taken under the policy.)

4. First warning

If your conduct or performance is unsatisfactory, you will be given a written warning. This warning will be recorded, but disregarded after (X) months of satisfactory work. You will be informed that a final written warning may be considered if there is no sustained satisfactory improvement or change. (Where the first offence is serious, for example because it is having a serious harmful effect, I may move directly to a final written warning.)

(Guidance Notes 4: It can be unfair to keep details of warnings on an employee's file indefinitely. Unless a warning is for a very serious matter, it should be disregarded after, say, six months to a year. The written warning should accurately record the warning given at the disciplinary interview. Do not write the warning before the interview.)

5. Final written warning

If the offence is serious, or there is no improvement in standards, or if a further offence of a similar kind occurs, a final written warning will be given. This will include the reason for the warning and a note that if no improvement results within (X) months, you will be dismissed.

(Guidance Notes 5: The warning should state clearly that dismissal will result from a failure to comply. Except in cases of gross misconduct employees should receive notice or payment in lieu.)

6. Statutory discipline and dismissal procedure

If you face dismissal the minimum statutory procedure will be followed. This involves:

- step one: a written note to you setting out the allegation and the basis for it.
- step two: a meeting to consider and discuss the allegation.
- step three: a right of appeal including an appeal meeting.

You will be reminded of your right to be accompanied by an advocate.

7. Gross misconduct

If, after investigation, it is confirmed that you have committed an offence of the following nature, the normal consequence will be dismissal without notice or payment in lieu of notice:

theft, damage to property, fraud, incapacity for work due to being under the influence of alcohol or illegal drugs, physical violence, bullying and gross insubordination.

(Note: the list is not exhaustive)

While the alleged gross misconduct is being investigated, you may be suspended, during which time you will be paid your normal pay rate. Any decision to dismiss you will be taken by me only after full investigation.

8. Appeals

If you wish to appeal against any disciplinary decision you must appeal in writing within five working days of the decision being communicated to you. Someone who was not involved in the original disciplinary action will hear the appeal and decide the case as impartially as possible. *(Note: You will need to think in advance who this might be, for example - the local advocacy agency/Independent Living Advisor/Direct Payment Support Service/User Led Organisation, etc.)*

(Guidance Notes 6: Operating the disciplinary procedure. The ACAS Advisory handbook – Discipline and grievances at work gives some useful information. You can download this as www.acas.org.uk/index.aspx?articleid=890 or order it from 08456 06 16 00.)

In brief, before taking disciplinary action using the procedure, you will need to be certain that:

- the matter cannot be resolved through informal counselling,
- you have investigated the matter fully,
- your PA is told that they will be interviewed and have the right to be accompanied by a fellow employee, friend or a trade union official of their choice.

At the disciplinary interview, make sure that:

- the employee concerned knows the details of the allegation.
- he or she has the opportunity to put across his or her side of the matter.
- any disciplinary measure is appropriate to the circumstances.

If a warning is given, it should tell the employee:

- the level of improvement required.
- the date by which it is to be achieved.
- what will happen if it is not.
- how to appeal.

sample grievance procedure

1. Introduction

This policy is to help resolve grievances that you have, relating to your employment, as quickly and as fairly as possible.

2. Informal discussions

If you have a grievance about your employment you should discuss it informally with me. I hope that most concerns will be resolved in this way.

3. Statutory grievance procedure

If you feel that the matter has not been resolved through informal discussions, you should raise it formally. You should follow the procedure below. Under the statutory grievance procedure:

Step 1: You must inform me of your grievance in writing.

Step 2: I will invite you to a meeting to discuss the grievance and notify you in writing of the decision. You have the right to be accompanied by a representative at all grievance meetings. This could be another employee, a union representative or a friend for example.

Step 3: You will be given the right to appeal against the decision.

4. Appeals

If you wish to appeal against any decision you must appeal in writing within five working days of the decision being communicated to you. Someone who was not involved in the original grievance will hear the appeal and decide the case as impartially as possible. *(Note: You will need to think in advance who this might be, for example – the local advocacy agency/Independent Living Advisor/Direct Payment Support Service/User Led Organisation, etc.)*

acknowledgements

ACAS (Advisory, Conciliation and Arbitration Service) www.acas.org.uk

ARC (Association for Real Change) www.arc.org.uk

Being the Boss www.beingtheboss.co.uk

Business Link UK www.businesslink.gov.uk

EDF www.edfwomen.org.uk

NAAPS www.naaps.co.uk

NCIL (National Centre for Independent Living) www.ncil.org.uk

PA Net (Personal Assistants Network) www.panet.org.uk

SCIE (Social Care Institute for Excellence) www.scie.org.uk

Skills for Care www.skillsforcare.org.uk

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