



# Personal Assistance Services

for Individuals with Serious Psychiatric Disabilities

## **Skill Training Curriculum: Collaborating Trainee Workbook**

Louisiana CPASS Program  
Louisiana Department of Health and Hospitals  
Office of Mental Health

Prepared by  
Center for Psychiatric Rehabilitation, Boston University  
Rehabilitation Research and Training Center  
National Institute of Disability Rehabilitation Research  
Center for Mental Health Services/SAMHSA

## Acknowledgments

The curriculum to train Personal Assistants has two elements: a competency or skill development component and a didactic or knowledge development component. The skill development components include Connecting, Coaching, Collaborating, and Managing Crises. The knowledge development component is a web-based curriculum entitled *Personal Assistance Services for Individuals with Serious Psychiatric Disabilities*.

This Collaborating module is based on the work of colleagues at the Center for Psychiatric Rehabilitation, Boston University. The material is derived and based upon the following:

- Cohen, M. R., Farkas, M. D., & Cohen, B. F. (1986). Coaching the client. *Psychiatric rehabilitation training technology: Functional assessment*. Boston: Boston University, Center for Psychiatric Rehabilitation.
- Cohen, M. R., Nemec, P. B., Farkas, M. D., & Forbess, R. (1988). Connecting with clients. *Psychiatric rehabilitation training technology: Case management*. Boston: Boston University, Center for Psychiatric Rehabilitation.

The writing team included: Cheryl Gagne, Christine Gayler, Donna Wilbur, the Steering Committee of Louisiana Department of Health and Hospitals, PAS Project, Ann Darling Kenyon, and Marianne Farkas.

The Community-Integrated Personal Assistance Services and Supports Project (CPASS), Louisiana Department of Health and Hospitals, Office of Mental Health, was funded by the 2003 Grant #11-P-92099/6-01 from the Center for Mental Health Services with a state match of funds.

Evaluation of the curriculum was supported in part by the National Institute on Disability and Rehabilitation Research and the Center for Mental Health Services, Substance Abuse and Mental Health Services Administration.

The writing team also wishes to acknowledge the trainers of BRIDGES, Louisiana, for being willing to invest their time and energy into pioneering this training; the students of the Recovery Center, Services Division, Center for Psychiatric Rehabilitation, Boston University for providing feedback and valuable insights into the development of the curriculum; Linda Getgen for the design and layout of the materials; Sue McNamara for proofreading the final version of the curriculum; and William A. Anthony, Executive Director of the Center for Psychiatric Rehabilitation, for his vision of recovery, research, and development that guides all of our efforts.

Curriculum Outline .....	2
Collaborating Introduction .....	3
Collaborating Example .....	4

## Defining Common Goals

Defining Common Goals Introduction .....	6
Defining Common Goals Example .....	7
Listing Tasks Description and Examples .....	8
Listing Tasks Exercise .....	10
Prioritizing Tasks Description and Example .....	11
Scheduling Tasks Description and Example .....	12
Steps for Defining Common Goals .....	13
Defining Common Goals Exercise .....	14

## Disagreeing

Disagreeing Introduction .....	16
Disagreeing Example .....	17
Acknowledging the Person's Position Description and Exercise .....	19
Stating Your Position Description and Exercise .....	21
Supporting Your Position Description and Exercise .....	23
Characteristics of a Good Disagreement .....	25
Deciding to Disagree .....	26
Disagreeing Exercise # 1 .....	28
Disagreeing Exercise # 2 .....	30

## Resolving Conflict

Resolving Conflict Introduction .....	31
Conflict Resolution Example .....	32
Necessary Ingredients for Conflict Resolution .....	34
Resolving Conflict Exercise .....	35

Training Pretest/Posttest .....	37
---------------------------------	----

## Curriculum Outline

### Connecting

- Listening
- Demonstrating Understanding

### Coaching

- Giving Directions
- Encouraging
- Giving Feedback

### Collaborating

- Defining Common Goals
- Disagreeing
- Resolving Conflict

### Managing Crises

- Developing a Crisis Plan
- Assessing Critical Information
- Implementing an Action Plan

## Collaborating Introduction

### **What is Collaborating?**

Collaborating is working in partnership with another person.

### **Why do Personal Assistants need to learn to collaborate?**

Collaborating ensures that the person and the Personal Assistant are working as a team.

### **How do Personal Assistants collaborate?**

The skills of Collaborating include:

- Defining Common Goals
- Disagreeing
- Resolving Conflict

### **When do Personal Assistants collaborate?**

Personal Assistants collaborate when they are working with a person with whom they are providing personal assistant services.

## Collaborating Example

Matt and his Personal Assistant Mike are together for their weekly meeting. Matt needs to get groceries and Mike feels responsible to make sure that Matt has enough food in the house to get him through the next week. Together they are planning the 3 hours they have together this afternoon.

Mike: So Matt, we have 3 hours to be together today. What would you like to do?

Matt: I don't really have anything to do around here. How about we take a drive and go to the Pancake House like we did last week. That was really nice.

Mike: You really enjoyed that! I did too! But while you say you don't have much to do around here, I think you probably need groceries because we didn't get any last week, and I can see that the kitchen could use some of our attention.

Matt: Don't worry about that. I've been looking forward to going out with you all week. Let's do something fun.

Mike: You really want to do something fun. Something a little different from the everyday. Let's list all the things we think we need to get done and the things you really want to do, and then we can see what we can fit into 3 hours. It's possible that we get your groceries, clean the kitchen, and still have time for fun, if we move quickly. How does that sound?

Matt: Okay. I guess. I really liked those pecan pancakes at that restaurant.

Mike: Let's make our list, and then we can see how much time we have for each task. What is the most important task, do you think?

Matt: I guess groceries.

Mike: Okay. I'll write down grocery shopping. How quickly do you think we can do that?

Matt: I don't know. Maybe if we make a list, we can be a lot faster.

Mike: Good idea. We'll make a list of the most important things, that way we'll be more efficient. In fact, I'll write "make a grocery list" on the top of the list of tasks to do today, then we can cross it off when we're done.

Matt: Good. I don't think the kitchen is that bad. My sister is coming this weekend, and she will help me clean it. She'll clean it for me.

- Mike: You would rather leave it for your sister to clean. She doesn't mind cleaning up after you?
- Matt: No. She's really good at cleaning. She doesn't mind at all.
- Mike: So you don't see cleaning the kitchen as a priority. How about we take out the trash, and put some of the food away, just to keep the bugs away. We can do that as we make the grocery list.
- Matt: Okay. We'll be quick.
- Mike: What else do you need to do today?
- Matt: Well, I don't know if I need to, I just really, really want to get away for a ride in your car and go to that Pancake House again.
- Mike: You really liked that restaurant. I'm glad. I've always liked it, too. But I don't think we'll have time to go way out there. It's over 45 minutes to drive there.
- Matt: Oh man! See I told you I don't need to go grocery shopping. My sister will take me grocery shopping this weekend. I want you to take me to the Pancake House.
- Mike: You're really disappointed because you've had your heart set on the Pancake House all week. I am happy to take you to a restaurant a little closer to town today. It's my responsibility to make certain that you have groceries in the house. I want to make sure that I meet my responsibilities and not push it off on your sister while we're out having a good time.
- Matt: She doesn't mind.
- Mike: Let's look at our schedule. If we make the list and tidy the kitchen now, we can be out of here by 1:30 and at the grocery store by 1:40. The store is not busy this time of day, so we can be out of there and back here to put the perishables in the refrigerator by 2:15. That will give us 90 minutes to take a drive and get something good to eat. I do know of a lot of places out in the countryside, and maybe you'll like it even better than the Pancake House. How does that sound?
- Matt: That sounds okay. I do want to go to the Pancake House again sometime soon. Hey do you think you could write the directions? Maybe my sister will take me this weekend.

## Defining Common Goals Introduction

### **What are common goals?**

Common goals are the tasks and timelines set by the person and the Personal Assistant. They are the goals that they share.

### **Why do Personal Assistants need to learn to define common goals?**

Defining Common Goals clarifies the focus of the work between the person and the Personal Assistant.

### **How do Personal Assistants define common goals?**

The skills of Defining Common Goals include:

- Listing Tasks
- Prioritizing Tasks
- Scheduling Tasks

### **When do Personal Assistants define common goals?**

Personal Assistants and the person they are assisting define common goals when they are determining how they are going to accomplish their shared responsibilities.



## Defining Common Goals Example

Sara and Marcia are meeting to plan out their work together. Sara helps Marcia manage her household and self-care tasks. They meet three times a week. Marcia does not like showering, but likes to have Sara style her hair and polish her nails. Sara has 90 minutes to meet with Marcia today.

Sara: Marcia what do you think we should do today?

Marcia: I don't know. I want you to paint my nails.

Sara: Good! I like polishing your nails. Let's use that new polish you bought last week. Before I paint your nails, you should shower and wash your hair so I can style your hair too.

Marcia: I don't need to shower. I showered yesterday.

Sara: You showered yesterday but not today, and it's best to start styling and polishing with a very clean body. While you shower, I will start with some of the housework. What needs to be done in the house?

Marcia: There are dishes and vacuuming. Maybe some tidying up in the living room and bedroom.

Sara: You're right! I'll start tidying up the bedroom and living room while you wash the dishes. Afterwards you can take a shower while I vacuum. Then we can style your hair and nails. How does that sound?

Marcia: I don't feel like washing the dishes.

Sara: Would you rather tidy the living room and bedroom while I wash the dishes?

Marcia: No. I'd rather wash the dishes. You do a good job tidying.

Sara: Thank you. So here's our plan. We'll start by having me clean the living room and bedroom while you wash the dishes. Then, I'll vacuum while you shower. That will leave us lots of time to do your hair and nails. How does that sound?

Marcia: Good.

Sara: Okay. Then, let's get started.

## Listing Tasks Description and Examples

### Listing Tasks Description

Listing Tasks is naming the tasks to be done. Some tasks may be mandated by the agency (for example, taking or giving medication, testing blood sugars). Other tasks are negotiable and are influenced by what the person and the Personal Assistant believe is important to do. What we believe is important often is influenced by our values.

### Listing Tasks Example

Listing Tasks		
Person's Name: Matt		
Assistant's Name: Mike		
Person's Task List	Personal Assistant Task List	Mandated Tasks
Grocery shopping	Grocery shopping	
Drive / restaurant meal	Clean kitchen	
	Clip toenails	
	Order heating oil	

#### Task List:

- Grocery shopping
- Cleaning kitchen
- Drive/restaurant meal
- Clip toenails
- Order heating oil

## Examples of tasks done with a Personal Assistant

- Showering
- Laundry
- Household tasks – cleaning and tidying
- Preparing meals
- Organizing weekly schedule
- Organizing household
- Grocery shopping
- Clothes shopping
- Going to appointments
- Local travel
- Attending social events
- Planning calendar
- Visiting socially
- Walking for exercise
- Participating in fitness activities
- Completing medical forms
- Paying bills
- Visiting family
- Accompanying to work

## Listing Tasks Exercise

List three examples of tasks that may be mandated by your agency:

1.

2.

3.

List three tasks that you believe are important for a Personal Assistant to work on with someone that they are assisting:

1.

2.

3.

List three tasks that a person receiving assistance wants to accomplish:

1.

2.

3.

How have values (agency's, Personal Assistant's, person's) influenced what has been included in the task lists?

## Prioritizing Tasks Description and Example

### Prioritizing Tasks Description

Prioritizing Tasks is determining the importance of each task, from most important to least important. When Prioritizing Tasks, the person and the Personal Assistant consider:

#### *Possibility*

- How long will it take to accomplish the task?
- Are the resources needed to accomplish the task available?

#### *Urgency*

- How important is it that the task be accomplished?
- What are the consequences of not doing the task?

#### *Desirability*

- How much does the person want to do the task?
- How much does the Personal Assistant want to do the task?

### Prioritizing Task Example

Prioritizing Tasks	Possibility		Urgency	Desirability
	Time Estimate	Resources Available		
Grocery shopping	60 minutes	Yes	High	High
Cleaning kitchen	15 minutes	Yes	Medium	Medium
Drive/restaurant meal	90 minutes	Yes	Low	High
Clip toenails	10 minutes	No	Medium	Low
Order heating oil	5 minutes	Yes	High	High

## Scheduling Tasks Description and Example

### Scheduling Tasks Description

Scheduling Tasks is determining when each of the prioritized tasks is going to be done. The schedule includes the order as well as the timeline for each task.

### Scheduling Tasks Example

Schedule	
Person's Name:	Matt
Assistant's Name	Mike
Date:	
Timeline	Task Activity
1:15 – 1:30	Empty trash, put away food, make grocery list
1:30 – 2:30	Shop for groceries and put away perishables
2:30 – 2:35	Order heating oil
2:35 – 2:45	Call Matt's nurse to tell her about toenail problem
2:45 – 4:00	Go for a drive and out to restaurant

## Steps for Defining Common Goals

### Listing Tasks

List the tasks that need to be done:

- Mandated tasks
- Person's task list
- Personal Assistant's task list

### Prioritizing Tasks

Discuss the possibility of accomplishing each of the tasks:

- Estimate the amount of time required for each task.
- Determine the availability of the resources needed to accomplish the task.

Discuss the urgency of the task from the perspective of the person and the Personal Assistant.

Discuss the desirability of the task from the perspective of the person and the Personal Assistant.

Prioritize the tasks based on shared perspectives of possibility, urgency, and desirability.

Defer or delegate tasks that are not prioritized.

### Scheduling Tasks:

Determine the order of the tasks.

Determine the start and end time.

## Defining Common Goals Exercise

**Person's Name:**

**Personal Assistant's Name:**

### **Directions:**

#### *Listing Tasks*

List the tasks that need to be done:

- Mandated tasks
- Person's task list
- Personal Assistant's task list

#### *Prioritizing Tasks*

Discuss the possibility of accomplishing each of the tasks:

- Estimate the amount of time required for each task.
- Determine the availability of the resources needed to accomplish the task.

Discuss the urgency of the task from the perspective of the person and the Personal Assistant.

Discuss the desirability of the task from the perspective of the person and the Personal Assistant.

Prioritize the tasks based on shared perspectives of possibility, urgency, and desirability.

Defer or delegate tasks that are not prioritized.

#### *Scheduling Tasks:*

Determine the order of the tasks.

Determine the start and end time.

### **Listing Tasks**

Person's Name:

Personal Assistant's Name:

**Person's Task List**

**Personal Assistant's Task List**

**Mandated Tasks**




Prioritizing Tasks	Possibility		Urgency	Desirability
	Time Estimate	Resources Available		

Schedule	
Person's Name:	
Personal Assistant's Name:	
Date:	
Timeline	Task Activity

## Disagreeing Introduction

### What is Disagreeing?

Disagreeing is sharing an opinion that is different from another person's point of view.

### Why do Personal Assistants need to learn to disagree?

Disagreeing is a way of differing with another person while staying in the relationship and moving towards a resolution. When we disagree, each person feels acknowledged and understood by the other.

### How do Personal Assistants disagree?

The skills of Disagreeing include:

- Acknowledging the Person's Position
- Stating Your Position
- Supporting Your Position

### When do Personal Assistants disagree?

Personal Assistants use the skills of Disagreeing when a misunderstanding gets in the way of accomplishing the work that the person and the Personal Assistant are doing.

## Disagreeing Example

Ben and David are at the grocery store. Ben has severe diabetes and has been instructed to limit his intake of carbohydrates and sugar. It's David's job to assist him with decisions about grocery purchases. In the past, Ben has gotten very angry with David while grocery shopping when David has disagreed with him about his grocery selections.

- Ben: Good. This is on sale this week. *(Placing one gallon of ice cream in his cart.)*
- David: You're good at finding the sales! The ice cream you put in your cart is the full-fat and full-sugar type. Here's one of the same sale brand that has half the sugar. Should you try this?
- Ben: Yes. Okay. I can't tell the difference in taste. As long as it's the same price as the other one.
- (Several minutes later....Ben tosses a package of hotdog rolls into his cart.)*
- David: I know you planned on having hotdogs for dinner this week. Did you know that these rolls have 55 grams of carbs each?
- Ben: I'm allowed to have bread! *(angrily and loudly)*
- David: Yes. You are allowed to have bread on your diet. I wonder if there are healthier options instead of these rolls with so many carbohydrates?
- Ben: I'm tired of this! I don't want to have to think about this all the time! I can buy what I want with my own money, and you're not my boss!
- David: You're fed up with all the work required to take care of your diabetes and eat well. You're angry with me because I always point out healthier choices when maybe you don't want to think about it all the time.
- Ben: I'm sick of it! When can I eat what I want?
- David: You feel frustrated because you can't just eat exactly what you like. You feel forced to make a lot of changes, and change is never easy—especially when you didn't choose it.
- Ben: You're right there. I never asked for diabetes. I wish I never even heard of diabetes!
- David: You wish you didn't have to worry about it. It's my job to help you, and I don't want to fight with you. I really do want to help. It seems like we might disagree from time-to-time about what the best choices are.

Ben: It's my decision about what I buy to eat.

David: You're right about that. It's your money, your body, and your decisions. I feel responsible for telling you about the healthiest options and for encouraging you in that direction, but ultimately it is your decision. How does that sound to you?

Ben: Yeah. That's right. I make the decisions, but you can tell me what you think is best.

David: Okay. I understand that sometimes we might disagree, and we might have to agree to disagree. I can handle that. How would you like for me to inform you about food choices and encourage you to make healthy decisions?

Ben: It's okay, but I still might get annoyed about it.

David: It sounds like we can live with our agreement to disagree sometimes.

## Acknowledging the Person's Position Description and Exercise

### Acknowledging the Person's Position

Acknowledging the Person's Position is demonstrating your understanding of the other person's point of view. You acknowledge by paraphrasing the other person's perspective. This lets the person know what you have heard and creates an opportunity for him or her to explain or clarify.

### Acknowledging the Person's Position Practice Exercise

Read each statement imagining that a person with whom you are working is saying them. Write what you might say to acknowledge the person's position. Use the Connecting skills of Paraphrasing and Responding to Feeling.

#### Example

Person: You and my mother are always making me do things I don't want to do. Whoever said that I wanted to exercise with you? I don't like going for a walk. Why do you always ask me to go for a walk? Everyone is always telling me to go for a walk.

Assistant: You feel pressured to exercise when you really don't want to.

#### Exercise I

Person A: I can't stand this mess. My apartment makes me depressed. The clutter overwhelms me. I don't know where to begin. I am a terrible housekeeper. You were such a big help to me last time we put this place in order.

Assistant:

**Exercise 2**

Person B: My case manager said that you had to clean my kitchen when you're here today. She told me that it was your job to do the housework, and that we shouldn't be spending time goofing around. She wants you to do your work when you're here.

Assistant:

**Exercise 3**

Person C: Please lend me \$20. I need it for groceries. I can pay you back next week when I get my check.

Assistant:

## Stating Your Position Description and Exercise

### Stating Your Position

Stating your position is asserting your point of view. The position statement is an “I” statement, and it is clear, concise, and direct.

### Stating Your Position Exercise

Continuing with the exercise, write what you might say to state your position. Ensure that your position is an “I” statement, and that it is clear, concise, and direct.

#### Example

Person: You and my mother are always making me do things I don’t want to do. Whoever said that I wanted to exercise with you? I don’t like going for a walk. Why do you always ask me to go for a walk? Everyone is always telling me to go for a walk.

Assistant: You feel pressured to exercise when you really don’t want to.

I am suggesting that we walk together as a way of improving your health as well as giving us a chance to talk about what has happened since our last meeting.

#### Exercise I

Person A: I can’t stand this mess. My apartment makes me depressed. The clutter overwhelms me. I don’t know where to begin. I am a terrible housekeeper. You were such a big help to me last time we put this place in order.

Assistant:

Assistant:

**Exercise 2**

Person B: My case manager said that you had to clean my kitchen when you're here today. She told me that it was your job to do the housework, and that we shouldn't be spending time goofing around. She wants you to do your work when you're here.

Assistant:

Assistant:

**Exercise 3**

Person C: Please lend me \$20. I need it for groceries. I can pay you back next week when I get my check.

Assistant:

Assistant:



### Supporting Your Position

Supporting your position is sharing the reasons for your point of view. Your rationale includes the evidence for your position, your observations, and the facts.

### Supporting Your Position Exercise

Continuing with the exercise, write what you might say to support your position. Ensure that your position includes your observations and the facts.

#### Example:

Person: You and my mother are always making me do things I don't want to do. Whoever said that I wanted to exercise with you? I don't like going for a walk. Why do you always ask me to go for a walk? Everyone is always telling me to go for a walk.

Assistant: You feel pressured to exercise when you really don't want to.

I am suggesting that we walk together as a way of improving your health as well as giving us a chance to talk about what has happened since our last meeting.

Your doctor told you that you need to exercise because your blood pressure is high. When we talked about what to do, we agreed that we would walk for twenty minutes each time we met.

#### Exercise 1:

Person A: I can't stand this mess. My apartment makes me depressed. The clutter overwhelms me. I don't know where to begin. I am a terrible housekeeper. You were such a big help to me last time we put this place in order."

Assistant:

Assistant:

Assistant:

**Exercise 2**

Person B: My case manager said that you had to clean my kitchen when you're here today. She told me that it was your job to do the housework, and that we shouldn't be spending time goofing around. She wants you to do your work when you're here.

Assistant:

Assistant:

Assistant:

**Exercise 3**

Person C: Please lend me \$20. I need it for groceries. I can pay you back next week when I get my check.

Assistant:

Assistant:

Assistant:

## Characteristics of a Good Disagreement

### Nonjudgmental

Disagreements avoid moral judgments.

### Objective

Disagreements are not influenced by personal feelings. They describe observations or facts.

### Clear

Disagreements are easy to perceive and understand.

Disagreement	Nonjudgmental	Objective	Clear
You feel pressured to exercise because your mother and I often invite you to come for walks. I don't want to force you to do anything you don't want to do. I invite you and you're free to say, "no." I also know that you've said that you've enjoyed our walks in the past.	✓	✓	✓
How can you say you don't need to do laundry? I can see from here that the hamper is overflowing. You're going to be sorry when you have no clean underwear. Don't come crying to me.			
You say you don't need to do laundry today, but I know that you haven't done laundry for over 2 weeks, and I can see from here that your laundry hamper is overflowing. I won't be back to help you until next week. We really need to do laundry today.	✓	✓	✓
You say that my job is to clean your apartment, but I am very clear about my job description. I am here to assist you to accomplish your household tasks, not to perform them for you. If you like I will bring you a copy of my job description.	✓	✓	✓
I am not going to take any more lip from you. I want you to get up out of that chair and start cleaning this place by picking up the papers and empty soda bottles.			✓

## Deciding to Disagree

Many people have difficulty with conflict. The goal of Disagreeing is not to vent emotion or to “get things off your chest.” Disagreements occur when a difference of opinion is getting in the way of the person and the Personal Assistant accomplishing their work. The *L.E.A.S.T.* approach is useful when deciding whether or not to disagree.

Level of Intervention	Description	Condition/Examples
<b>Leave it alone</b>	Do nothing at all. Let the statement or behavior go. Don't hold on to it in any way.	When the statement or behavior is minor, has few consequences, and is very infrequent, it is not necessary to address it. Also, when the person cannot help the behavior. <ul style="list-style-type: none"> <li>• <i>Person didn't say “thank you” to a waitress.</i></li> <li>• <i>Person drools on pillowcase.</i></li> </ul>
<b>Eyeball it</b>	Simply look at the person to communicate “I know you know we disagree about that.”	This works well in a public place when you don't want to risk embarrassing the person with a disagreement or confrontation. This level also requires some comfort and knowledge about each other. <ul style="list-style-type: none"> <li>• <i>Person lights up a cigarette in no smoking area.</i></li> <li>• <i>Person is talking in church.</i></li> </ul>
<b>Attend to it</b>	In this level you attend to it directly. This is the level where you use the skills and behaviors of Disagreeing.	This is needed when the disagreement or behavior is getting in the way of your relationship. <ul style="list-style-type: none"> <li>• <i>Person refuses to help with laundry</i></li> <li>• <i>Person blasts Black Sabbath every time you visit.</i></li> </ul>
<b>Strategize</b>	At this level you already have had one or more disagreements about the topic. This involves resolving more difficult conflict. Over the course of a relationship, you may need to strategize several times to discover strategies that work for everyone.	This level of intervention is needed when a simple disagreement does not resolve the problem. It also will be used when the disagreement or behaviors lead to crisis or are dangerous (See the Crisis Intervention Model). Strategizing sometimes may involve other people.

Level of Intervention	Description	Condition
<b>Terminate</b>	This level of intervention refers the ending of the relationship between a Personal Assistant and the person he or she is assisting. The person may go on to hire another Personal Assistant depending on the decision of the agency.	This is an extreme measure. This level of intervention is rarely necessary, but it is a possibility. Sometimes conflict cannot be resolved either because of the nature of the disagreement or the lack of willingness on the part of the parties involved. In these situations, ending the relationship is possible.

## Disagreeing Exercise # 1

Read each statement. Assume that you are a Personal Assistant, and that the statement is made by a person that you are assisting. The statement is contrary to your point of view.

### Write a Disagreement

- Acknowledge the Person's Position
- State Your Position
- Support Your Position

### Statement 1

I want to cancel that dentist appointment. My tooth doesn't hurt anymore, and I really don't feel like going.

Acknowledge the Person's Position:

State Your Position:

Support Your Position:

**Statement 2**

Let's go to the mall instead. I just got my check,, and I want to go shopping. I need to buy my granddaughter a birthday gift.

Acknowledge the Person's Position:

State Your Position:

Support Your Position:

**Statement 3**

*(In the grocery store.)* I don't care what my doctor says. I'm buying this ice cream. It's two half-gallons for the price of one. It's my favorite brand, and I've been so good lately. I don't think cheating once in a while will hurt my diabetes at all.

Acknowledge the Person's Position:

State Your Position:

Support Your Position:

## Disagreeing Exercise # 2

### Directions for Roleplay

- Meet with a partner.
- Choose a disagreement from the list below.
- Review the skills of Disagreeing and use the skills during the roleplay exercise.
- When you have completed the roleplay, review your performance with your partner, using the Disagreeing checklist to guide your self-assessment.
- Switch roles and repeat the roleplay.

### Topics for Roleplay

- You disagree about your role. The person you work for believes that it is your job to perform all the household cleaning tasks. You know that your role is to assist the person to perform household cleaning tasks.
- You disagree about the person's need for a shower. She states that she took a shower yesterday, but you note that she needs a shower today.
- You and your supervisor disagree about one of your job tasks. She believes that you should be able to go into anyone's home by yourself if it's your job to do so. You wish to get to know the person before you make the decision to work in his/her home alone with the person.

### Disagreeing Skills Checklist

Skill Name	Nonjudgmental	Objective	Clear	Comments
Acknowledging the Person's Position				
Stating Your Position				
Supporting Your Position				



## Resolving Conflict Introduction

### What is Resolving Conflict?

Resolving Conflict is working out differences.

### Why do Personal Assistants need to learn how to resolve conflict?

Personal Assistants learn how to resolve conflict so that they know what to do when they encounter disagreements that are difficult to settle.

### How do Personal Assistants resolve conflict?

The skills of conflict resolution include:

- Summarizing the Disagreement
- Identifying Shared Interests
- Finding Win-Win Solutions
- Requesting Mediation

### When do Personal Assistants use the skills of Resolve Conflicts?

The skills of Resolving Conflicts are required when Personal Assistants encounter disagreements that are difficult to settle or that occur frequently.

## Conflict Resolution Example

Mike is a Personal Assistant to Matt. They have been having a long-running disagreement about how they should spend their time together. Matt has difficulty managing his home. The apartment, especially the kitchen and bathroom, becomes filthy because Matt does not clean up after himself. Matt also does not do his own laundry unless he has a lot of assistance. His family and treatment team want Mike to assist Matt to accomplish these tasks. They have purchased 3 hours a week of personal assistance services to help Matt carry out these critical independent living skills.

Mike takes his responsibilities seriously. He has found that to accomplish these tasks, it's best to meet with Matt twice a week for 1.5 hours each time, to clean and do laundry.

Matt does not like this arrangement. Matt wants Mike to meet with him at least once a week, but for at least 3 hours so that they can do social recreational activities. Matt has become quite angry because he and Mike can no longer do the activities he so enjoys.

Mike feels pressured because Matt is angry and unhappy with the current arrangement while Matt's treatment team and parents seem satisfied. After frequent disagreements about how they will spend their time together, Mike summarized the disagreements, and Matt and he have entered a process of conflict resolution.

### I. Summarize the Disagreement

Mike's Position	Matt's Position	Differences
Wants to help Matt carry out important tasks like cleaning and laundry.	Wants Mike to do fun things with him.	The amount of Mike's time needed to help Matt keep his apartment clean to meet the demands of Matt's treatment team and parents.
Wants Matt to succeed in living in his apartment.	The amount of Mike's time needed to help Matt keep his apartment clean to meet the demands of Matt's treatment team and parents.	
Wants to meet the demands of Matt's treatment team and parents.		
Wants Matt to feel satisfied with his assistance.		
Doesn't need as much help with cleaning and laundry.		

## II. Identify Shared Interests

	Mike	Matt
<b>Interests</b>	Wants Mike to do fun things with him. The amount of Mike's time needed to help Matt keep his apartment clean to meet the demands of Matt's treatment team and parents.	Wants parents to be happy with Mike's services. Wants to be happy with Mike's services.
<b>Values</b>	Relationship is important Having fun	Relationship is important Having fun
<b>Goals</b>	Matt is successful living in this apartment.	I am successful living in this apartment.

## III. Find Win-Win Situations

1. Mike and Matt organize a proposal to increase the amount of time that Mike spends with Matt each week so that critical tasks (cleaning and laundry) and recreational activities can be accomplished.
2. Matt talks to his treatment team and parents to lighten up on their standards for independent living.
3. Matt's parents hire a house cleaner who cleans once a week, and Mike helps with laundry only and does the fun activities.
4. Matt increases his ability to clean and do laundry without support, but not lose time with Mike. Then Mike can use their time together to do fun activities.
5. A combination of #1 and #4 in which Mike's time with Matt increased for 3 months and gradually decreased back down to 3 hours per week. The goal being that Matt learns to accomplish task more independently leaving time for Mike and Matt to do some recreational activities.  
(Preference)

## Necessary Ingredients for Conflict Resolution

### Value Relationship

Both parties recognize the value of the relationship and have a desire to continue it. If one person is not invested in continuing the relationship, it's really hard to resolve conflict.

### Active Participation

Both parties need to be willing to be involved in the conflict resolution. Passive observation of the process doesn't do much to resolve conflict.

### Mutual Respect:

Both parties must show consideration and acceptance of each other's positions, values, beliefs, and goals.

### Nonjudgmental Stance

It's important to separate personality characteristics from the issues involved.

Tips for Successful Negotiations
Listen
Communicate clearly
Respect the other person
Clearly define the problem
Seek solutions from a variety of sources
Preserve the relationship

## Resolving Conflict Exercise

### Directions

- Read the scenario below.
- Summarize the disagreement, paying close attention to the details of Charles' and Maggie's positions.
- Roleplay a discussion to identify shared interests, values, or goals. One person will play Maggie and the other will play Charles.
- Write the shared interests, values, or goals.
- Continue the roleplay and together brainstorm a list of possible solutions. Remember to write down all possible solutions, even if they seem far fetched.
- Continue the roleplay and select a win-win solution, one that seems to fit each person's interests, values, and goals.

### Conflict Scenario

Charles is helping Maggie with her household chores. Maggie does not like to perform any of the tasks needed to keep her apartment clean. Maggie often will say that it is Charles' job to clean the apartment. Charles has clarified his role many times, but Maggie continues to insist that his job is to clean and that she shouldn't have to clean.

On the other hand, Maggie does like Charles. She likes his company and the music he plays for her while they clean. She likes that he is willing to do the "heavy work," like moving furniture, carrying out the trash, and changing light bulbs without asking her help.

Charles wants this conflict resolved once and for all. He enjoys his time with Maggie, but wants to do his job well and assist her rather than do everything for her. He feels irritated with the problem, but wants to try to resolve this before bringing his supervisor or Maggie's case manager into the problem.

### Summarize the Disagreement

Charles's Position	Maggie's Position	Differences

### Identify Shared Interests

	Charles	Maggie
<b>Interests</b>		
<b>Values</b>		
<b>Goals</b>		

### Find Win-Win Situations

Brainstorm Options:

Select Best Fit Option:

**Personal Assistant Services**

1. What is a Personal Assistance Service?

---

---

---

---

---

2. What is the role of a Personal Assistant?

---

---

---

---

---

3. What are the tasks of a Personal Assistant?

---

---

---

---

---

---

---

4. What are the critical skills that a Personal Assistant performs?

---

---

---

---

---

---

---

## Recovery and Rehabilitation

1. What is the recovery vision?

---

---

---

---

2. What is the goal of recovery?

---

---

---

---

3. What is the mission of psychiatric rehabilitation?

---

---

---

---

---

4. What are the primary rehabilitation interventions?

---

---

---

---

---

---

---

---

---

---



### Connecting

1. What is Connecting?

---

---

---

---

---

2. Why is it important for a Personal Assistant to connect with the person that they are working with?

---

---

---

---

---

3. Two Connecting skills are Listening and Demonstrating Understanding:

- Listening—Listening involves three steps: 1) Preparing, 2) Attending, and 3) Recalling. Briefly describe what a Personal Assistant would do when they are Preparing, Attending, and Recalling:

---

---

---

---

---

---

---

---

---

---

## Training Pretest/Posttest

- Demonstrating Understanding—There are two skills in Demonstrating Understanding: 1) Paraphrasing and 2) Responding to Feeling

Assume that you the person's Personal Assistant. Read the following statement:

*I never new they'd give me someone like you to help me with stuff at home. I didn't let my doctor or nurse know how bad things have gotten around here since my sister died because I thought they'd make be go to a home.*

Write down how you would paraphrase what they have shared with you:

---

---

---

---

---

---

*You can see what a mess this place is. It just got away from me. I plan to pick up and put things away, but now it's so bad I don't know where to begin.*

Write down your response to the feelings the person has expressed:

---

---

---

---

---

---

4. When do Personal Assistants use Connecting skills?

---

---

---

---

---

---

### Coaching

1. What is Coaching?

---

---

---

---

2. What are the benefits of Coaching?

---

---

---

---

3. There are three Coaching skills: 1) Giving Directions, 2) Encouraging, and 3) Giving Feedback:

- Giving Directions—Two types of directions are: 1) Orientations and 2) Instructions  
What is the difference between the two?

---

---

---

---

- Encouraging—There are three techniques for encouraging: 1) Praising Efforts, 2) Praising Accomplishments, and 3) Modifying Directions

Create a brief example of one of the techniques for the skill of washing clothes.

---

---

---

---

---

---

## Training Pretest/Posttest

- Giving Feedback

What are the characteristics of good feedback?

---

---

---

---

---

---

---

---

4. When do Personal Assistants coach a person?

---

---

---

---

### Collaborating

1. What is Collaborating?

---

---

---

---

2. Why is it important that Personal Assistants collaborate with the person that they are working with?

---

---

---

---

### 3. Collaborating skills include Defining Common Goals, Disagreeing, and Resolving Conflict:

- Defining Common Goals—Briefly describe how to define common goals?

---

---

---

---

- Disagreeing—Write down what you might say in Disagreeing with the following statement:

*My case manager said that you had to clean my kitchen when you're here today. She told me that it was your job to do the housework and that we shouldn't be spending time goofing around. She wants you to do your work when you're here.*

---

---

---

---

- Resolving Conflict—What is the difference between a disagreement and a conflict?

---

---

---

---

---

---

### 4. When do Personal Assistants use Collaborating skills?

---

---

---

---

---

## Managing Crises

1. What is Managing Crises?

---

---

---

---

---

---

---

---

2. Why is it important for Personal Assistants to be able to manage crises?

---

---

---

---

---

---

---

---

3. The skills of Managing Crises include:

- Developing a Crisis Plan—Briefly describe how a Personal Assistant would develop a crisis plan with a person they are working with:

---

---

---

---

---

---

---

---

## Training Pretest/Posttest

- Assessing Critical Situations—What are some examples of critical situations a Personal Assistant may need to assess?

---

---

---

---

---

---

---

---

- Implementing an Emergency Response—As well as the actions laid out in a person's crisis plan, what else influences how a Personal Assistant responds during an emergency?

---

---

---

---

---

---

---

---

4. When does a Personal Assistant begin to manage crises?

---

---

---

---

---

---

---

---

## Notes