

Personal Assistance Services

for Individuals with Serious Psychiatric Disabilities

Skill Training Curriculum: Coaching Trainee Workbook

Louisiana CPASS Program
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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*.

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- 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. (2000). Connecting for rehabilitation. *Psychiatric rehabilitation training technology: Rehabilitation readiness*. 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.

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Curriculum Outline

Connecting

- Listening
- Demonstrating Understanding

Coaching

- Giving Directions
- Encouraging
- Giving Feedback

Collaborating

- Defining Goals
- Disagreeing
- Resolving Conflict

Managing Crises

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

Coaching Introduction

What is Coaching?

Coaching means assisting a person to participate in activities.

Why do Personal Assistants need to learn to coach?

Coaching encourages a person to perform activities more independently.

What are the skills of Coaching?

1. Giving Directions
2. Encouraging
3. Giving Feedback

When do Personal Assistants use Coaching skills?

When they are assisting a person to perform an activity.

Coaching Example

Barry and Joe are planning a trip to the grocery store. Barry is assisting Joe to write a list of needed food and household items.

Barry: When planning a trip to the grocery store it's best to prepare a written list of what you need—for both food and household items like toothpaste and dish soap. Writing it down and carrying the list to the store helps us make sure that we buy what you need most. So what should we do first?

Joe: I have a pen and paper.

Barry: Good. Thank you. Do you want to write or shall I do the writing?

Joe: You can write.

Barry: Okay. I'll write. You can look around the kitchen and think about what you need at the store. Before you start searching, is there anything you know you need for groceries?

Joe: Orange juice.

Barry: Okay. I'll write that down. Is there anything else you need?

Joe: I don't know.

Barry: Okay. Now, you need to be more organized in your search for needed groceries. First, open the refrigerator and go through a checklist in your head. Milk? Eggs? Butter? Catsup? Cheese? Fruit? Vegetables?

Joe: I need milk, peaches, and lettuce.

Barry: Good job! You were very thorough checking all parts of the refrigerator for the things you might need. Next, check the cupboard and use another checklist. Cereal? Bread? Crackers?

Giving Directions Introduction

What is Giving Directions?

Giving Directions is providing a person with specific information about how to do something.

Why do Personal Assistants need to give directions?

Personal Assistants Give Directions in order to clarify what a person needs to do when they perform an activity.

How do Personal Assistants give directions?

Giving Directions skills include:

- Orienting
- Instructing

When do Personal Assistants give directions?

Personal Assistants use the skills of Giving Directions when they are guiding a person through an activity.

Common Types of Directions

Orienting

An Orientation gives the person a preview of the activity ahead. An orientation is given before the activity begins.

An orientation includes:

- What: A description of the activity.
- Why: The purpose or benefits of the activity.
- Roles: The personal assistant's tasks and the person's tasks.

Example of an Orientation

Now I am going to demonstrate how to sort laundry. Sorting laundry makes sure that clothes that are similar in color and fabric are washed together so that they get clean and the colors don't stain each other. For example, never wash a red t-shirt with white underwear or else you will have pink underwear. I want you to watch me and listen to my directions. Later, I'll ask you to show me how you would sort these loads of laundry.

Instructing

Gives information about the specific behaviors to be performed by the person during the activity.

Characteristics of instructions:

- Behavioral: Describes specific actions that need to be performed. Describe exactly what the person needs to do.
- Clear: Use language the person understands and/or illustrates exactly what the person needs to do.

Example of Instructions

- Take the clothes and put them into the laundry basket.
- Pour the laundry detergent to the full line in the measuring cup and pour it evenly over the clothes in the washing machine.

Example of Giving Directions

Beth is Nancy's Personal Assistant. She is helping Nancy to do her laundry. Beth is giving Nancy directions on using the washing machine.

Beth: Nancy, now that you've sorted the clothes, you're going to use the washing machine. Have you used the washing machine before?

Nancy: I haven't used this machine. I used to wash clothes at my mother's house, but her machine was a lot different from this one. This one looks complicated.

Beth: Okay. You have some experience. That's great. How is it going to help for you to know how to use this machine?

Nancy: I want to be able to do my laundry here at my apartment whenever I need to. I have been afraid to come down here because I don't know anyone. I don't like talking to people I don't know. I'll feel more confident if I know how to use the machine.

Beth: Okay, let's get started.

Now I am going to demonstrate how to wash clothes using this machine. First, I will demonstrate all the steps while I describe how to use it. You will listen and watch me carefully. Then I'll take the clothes out, and ask you to do the steps yourself. I will be watching you carefully to make sure everything goes okay.

Is it clear to you what we're going to do?

Nancy: You're going to show me how to do it, and then I'm going to use the machine myself.

Beth: Perfect. That's it exactly! Let's begin.

We start by putting the clothes into the machine. Distribute the clothes evenly and loosely around the drum of the machine. This part of the machine is called the drum. It's important that you do not overload the machine because clothes do not get clean.

Nancy: Okay. That looks good.

Beth: Now I want you to try this part of washing the clothes. I'll take the clothes out, and you're going to distribute the load exactly as I showed you.

Nancy: Okay. Let me try.

Orienting Exercise

You are assisting Peggy to prepare a grocery list. She has never independently prepared a list of groceries that she needed for shopping. Write word-for-word what you would say to orient her to this task. Remember parts of an orientation include the What, Why, and Roles.

Instructing Exercise

You continue assisting Peggy to write her grocery list. Walk through the task in your mind, and imagine the detailed steps needed to accomplish the task of writing a grocery list. Write down the instructions you would give to Peggy to assist her to write a grocery list.

Encouraging Introduction

What is Encouraging?

Encouraging is promoting confidence in the person the Personal Assistant is supporting.

Why do Personal Assistants need to learn to encourage?

Personal Assistants want to actively involve the person in an activity or task. Encouraging increases the person's commitment to and participation in the activity or task.

How do Personal Assistants encourage?

Encouraging skills include:

- Praising Efforts
- Praising Accomplishments
- Modifying Directions

When do Personal Assistants offer encouragement?

When guiding a person through an activity or task.

Types of Encouragement

Praising Efforts

Praising Efforts means complimenting the attempts that the person has made to perform the activity or task.

Example: You've really worked hard on reorganizing the living room.

Praising Accomplishments

Praising Accomplishments means complimenting the outcome of the person's efforts.

Example: You look terrific today. I like the way you've fixed your hair.

Modifying Directions

Modifying Directions means changing the instructions you have given to the person to make it easier for him or her to perform the task.

Example: Let's try it another way. Instead of using different cups, use the same measuring cup each time you do laundry.

Encouraging Example

Alisha is assisting Peggy to be more successful in living in her own apartment. Grocery shopping and budgeting are two critically important skills that Peggy needs to perform. Today, Alisha is helping her with the skill of writing a grocery list.

Alisha You've written "orange juice" and "skim milk" on your list. Very good start. While you're looking in the refrigerator, is there anything else you need?

Peggy It looks like I am out of salad dressing. I need French and Ranch dressing.

Alisha Good eye! I often forget things like dressing until I make a salad and realize that I am out. Go ahead and write that down. Is there anything else you need?

Peggy No, I don't think so.

Alisha: Sometimes it helps to think about meals you frequently prepare to find items that you need.

Peggy: I only have 2 eggs. Maybe I should buy eggs.

Alisha Great. Write that on your list.

Let's look in the cupboard where you store other food. Is there anything else you need there?

Peggy I know I need soda and potato chips.

Alisha Okay. Put those on the list. Thinking about meals for next week, is there anything else you need to buy?

Peggy I am out of spaghetti. I have all this tomato sauce. Oh yeah, and Parmesan cheese. I need more salad stuff too.

Alisha Okay, write those down. You're doing a great job with this list. It really helps when you to think about meals for the week.

Encouraging Exercise

In this exercise there are several examples of encouraging. Please read the examples for each type of encouragement and then add a few examples of your own.

Praising Efforts

- I see how committed you are to succeeding here in your own apartment.
- I've noticed how much effort you put into learning everyone's name at the social club.

Praising Accomplishments

- You've been living in this apartment for 6 months now. You're doing so well. I think that this calls for a celebration.
- You've done a great job with the kitchen this week. Everything is so organized and so clean.

Modifying Directions

- Maybe we should break things down into smaller steps. It seems a lot to do all at once.
- When centering yourself, sometimes it is helpful to focus on the sensation of gravity pressing your feet against the floor.

Giving Feedback Introduction

What is Giving Feedback?

Giving Feedback is critiquing the tasks or behaviors the person has done.

Why do Personal Assistants need to give feedback?

Giving Feedback provides the person with important information about how they performed the activity; what they did well and what areas need improvement.

How do Personal Assistants give feedback?

- Ask person to conduct a self-assessment.
- Share your perspective.

When do Personal Assistants give feedback?

Give feedback when someone has completed an activity or performed a task.

Steps for Giving Feedback

Ask the person to critique his or her performance:

- Overall
- Areas of strength
- Areas for improvement

Share your perspective:

- Overall
- Areas of strength
- Areas for improvement

Giving Feedback Example

Mike and Matt are working together. Mike is helping Matt learn how to grocery shop. They're in the store nearing the checkout line, and Mike is giving Matt feedback on how he did in selecting items in the store.

Mike: Okay, Matt. We're at the checkout line now. You've finished selecting all the items that you wanted to buy. Let's take a minute to talk about how it went. Is that okay?

Matt: Sure. That's okay.

Mike: So, how do you think you did selecting grocery items today?

Matt: Um. Good. I was pretty fast at it. I remembered almost everything on my list. You had to remind me to slow down and get some bread, but that is all that I forgot, I think.

Mike: I agree, Matt. You remembered almost everything this week. That was great. I saw that you referred to your own list a couple of times to make sure you didn't forget anything. You did that without having me reminding you to look at the list.

Matt: Yeah. I remembered everything, except the bread. You only had to tell me about the bread.

Mike: You were great at remembering and using the grocery list this week. You said that you were pretty quick, and I have to agree. You move through this store very quickly. In fact, that is the one thing I'd like you to do differently next time. I want you to move less quickly. Sometimes you're moving so fast that I fear you might hit someone with the cart. I worry about that. Please move more slowly, more carefully through the store with the cart, Matt.

Matt: Okay, Mike. I'm always in a hurry to get out of the grocery store.

Mike: You feel rushed, but we really have plenty time today. My grandfather always said, "Don't hurry or you'll be late."

Matt: Don't hurry or you'll be late? Your grandfather is a funny guy.

Mike: It means, sometimes when we rush, things go wrong, and it ends up costing us more time.

Characteristics of Good Feedback

Involving

Encourages the person's participation in the feedback.

Descriptive

Presents a clear picture of the person's performance.

Balanced

Describes both strengths and areas for improvement.

Objective

Focuses on the task and not the person.

Steps for Giving Feedback

Ask the person to critique his or her performance

1. Overall
2. Areas of strength
3. Areas for improvement

Share your perspective

1. Overall
2. Areas of strength
3. Areas for improvement

Giving Feedback Exercise

Read each example of Giving Feedback. Decide whether you think the example is good or poor. If you think it's a poor example, describe which characteristics of good feedback are missing.

Feedback Example	Good	Poor
<p>1. The closet is still a mess. You didn't hang up all the clothes. Your shoes are in a pile, and a lot of stuff is still disorganized.</p> <p>Comments:</p>		
<p>2. I agree that you did a good job sorting the clothes. You've divided all your clothes into two loads, dark and light. You washed the clothes and dried the clothes. I would say that the only area for improvement is drying the towels for a longer period of time. They're folded nicely, but they're still damp.</p> <p>Overall, you did an excellent job.</p> <p>Comments:</p>		
<p>3. Very good! Good job on the kitchen. I like the way you reorganized the countertop.</p> <p>Comments:</p>		
<p>4. You did it again. Don't put dirty clothes on top of clean clothes in the laundry basket. Then we have to rewash them all again.</p> <p>Comments:</p>		

The Feedback Loop

The feedback loop is a method for critiquing your own or another person's performance.

Characteristics

- Objective: uses a list of standards to evaluate the performance.
- Specific: details the behaviors performed.
- Personalized: is 'tailor-made' for the individual.
- Balanced: includes strengths and areas for improvement.

Structure

1. Overall impression.
2. Strengths of the performance.
3. Areas for improvement.

Order

1. Person performing starts.
2. Person participating in the performance goes next.
3. Person observing goes last.

Example

Person who performed:

Overall I think it went pretty smoothly. I was more comfortable than I thought I would be. I was really well prepared. My strengths were that I oriented the class well to the presentation. I made good eye contact, and I think the pace of the presentation was good. What I would like to improve: I need to listen better when people are asking questions. I started answering Jeff's question before I really understood what he was asking.

Person participating in the performance:

Overall it was a great presentation with lots of useful information. You obviously know your stuff. I agree with you on your strengths, the pace was perfect. You slowed down and explained a point just when I was feeling confused. I would add that you did really do a nice job engaging us in the learning by asking us about our experiences. In terms of area for improvement: I think you're right in terms of taking more time to listen and understand the question before answering. And another area might be giving fewer handouts. I felt overwhelmed by all the information you gave me. It was a really good presentation.

Coaching Exercise

In this exercise you will teach your partner how to create a daily schedule. As you teach the skill, you will use Coaching skills to assist your partner to perform the skill independently. Use the Coaching checklist on the following page to make sure that you have used all the skills of Coaching.

Before you begin:

1. Write out an orientation to create a daily schedule.
2. Organize the materials you will need:
 - Example of daily schedule
 - Blank schedule
 - Paper
 - Pens/pencil
3. Prepare yourself to coach.

Exercise:

1. Orient your partner to the activity.
2. Discuss with your partner about how learning the skill of creating a Daily Schedule may be useful to him or her.
3. Show an example of a daily schedule, and discuss the features of the schedule: the tasks listed, variety of tasks, size of tasks, timelines estimated, etc.
4. Teach the steps of creating a daily schedule:
 - List the necessary tasks
 - List the desired tasks
 - Prioritize tasks
 - Evaluate fit
5. Ask the learner to create a daily schedule for a day of their choosing.
6. Give feedback using the feedback loop.
7. Review activity.
8. Discuss the experiences the learner had with doing the exercise. (i.e. Was it easy or difficult? Was the exercise enjoyable or not? Do they feel confident about doing the activity on his/her own?)
9. Discuss how the learner might use the activity. What might get in the way of them using the activity?

Coaching Checklist

Skill	Skill Use		Comments
	Yes	No	
Orienting			
Instructing			
Praising Efforts			
Praising Accomplishments			
Giving Feedback			
• Involving			
• Descriptive			
• Balanced			
• Objective			

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?

Training Pretest/Posttest

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

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?

Training Pretest/Posttest

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?

Horizontal lines for writing the answer to question 1.

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

Horizontal lines for writing the answer to question 2.

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:

Horizontal lines for writing the answer to question 3.

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?
