

CPASS

Personal Assistance Services

for Individuals with Serious Psychiatric Disabilities

Skill Training Curriculum: Collaborating Trainer Guide

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.

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Trainer Guide Introduction

The Trainer Guide is a resource for trainers who are teaching skills to those who are, or who will be, providing Personal Assistant Services to persons with a psychiatric disability.

The Trainer Guide is a lesson plan for a specific skill set. The four skill sets that comprise the Personal Assistant Services Curriculum include:

- Connecting
- Coaching
- Collaborating
- Managing Crises

Each lesson plan is divided into five sections:

- Review—Skill set is introduced.
- Overview—Key information about the skill set is presented.
- Presentation—Specific skills are taught.
- Exercise—Trainees’ learning is consolidated.
- Summary—Learning experience is reviewed.

The approach to skill training is Direct Skills Teaching. In a classroom setting, trainees learn how to perform new skills from:

- The information that the trainer imparts to them about the skill.
- Observing examples of the skills being performed.
- Having opportunities to practice the skill.

In the lesson plan the knowledge presented is written as a “Tell,” the examples as a “Show,” and the practice opportunities as a “Do.”

Preparation is key in training. Trainers are encouraged to read relevant literature about Personal Assistant Services as well as recovery and rehabilitation prior to the training. Trainers are encouraged to learn about the people they will be training, their background, their experiences, and their settings.

While there is a sample schedule provided with each lesson plan, this is intended as a guide only, and the trainer will need to give thought to the parameters of the particular training experience as they plan their training schedule and prepare for the training session.

Training is a process and a trainer’s ability to engage and respond to the trainees in the moment and to modify the lesson plan as needed is key to a successful training experience.

Training Evaluation

It is helpful for the trainer to get feedback on how much the participants have learned in the course of the training program you have conducted. Feedback allows you to modify the lessons for the next time you teach. A copy of the Training Pretest/Posttest is included at the end of each Trainee Workbook and Trainer Guide. Trainees should be asked to complete the test at the beginning of the training, and again at the very end of training. These tests have been constructed to evaluate training that is done for all four of the modules in the PAS Skill Training Curriculum. If you are not conducting training in all four modules, you can modify the tests to eliminate those questions that relate to the modules you are not teaching.

You will need to adapt the sample session schedules as needed to allow time for this testing. Given the range of participants likely to take this type of training, it is useful to allocate between 20 to 45 minutes to allow the participants to read the questions, write the answers, and shift their focus back to the overview you will be providing next. Often it is useful to schedule a small break of about 5 to 10 minutes after the testing to allow for a positive transition.

Pretest Evaluations

After you have given your introduction to the training and before you provide an overview of the materials, ask trainees to complete the test as a pretest, or evaluation of the trainees' current level of knowledge. If your participants already know a lot of the material you can modify your curriculum to shorten the explanations or descriptions. If they know very little, then the curriculum can be taught just as is.

Posttest Evaluations

After you finish summarizing the modules you have taught, ask trainees to complete the tests again as a posttest, or evaluation of the knowledge and skills developed.

If you find that your participants in different trainings consistently are not learning a certain aspect of a skill, you can spend more time on that aspect or add more examples as needed, either as a follow up to this training, or for the next time you teach this material to another group.

On the other hand, if you move through the material quickly and your participants still can acquire the skills you have been teaching, perhaps you can modify some parts of the lesson to shorten the overall time spent doing that part of the training.

Collaborating Session—Sample Schedule

Day 1

9:00 AM	–	9:30 AM	Welcome and Introductions
9:30 AM	–	10:15 AM	Personal Assistance Services: Skills Training Curriculum
10:15 AM	–	10:30 AM	Break
10:30 AM	–	11:15 AM	Collaborating Review
11:15 AM	–	12:00 PM	Collaborating Overview
12:00 PM	–	1:00 PM	Lunch
1:00 PM	–	2:15 PM	Presentation 1: Defining Common Goals
2:15 PM	–	2:30 PM	Break
2:30 PM	–	4:00 PM	Presentation 1: Defining Common Goals continued
4:00 PM	–	4:30 PM	Review of Day

Day 2

9:00 AM	–	9:15 AM	Review of Day 1
9:15 AM	–	10:15 AM	Presentation 2: Disagreeing
10:15 AM	–	10:30 AM	Break
10:30 AM	–	12:00 PM	Presentation 3: Resolving Conflict
12:00 PM	–	1:00 PM	Lunch
1:00 PM	–	2:15 PM	Collaborating Exercise
2:15 PM	–	2:30 PM	Break
2:30 PM	–	4:00 PM	Collaborating Exercise
4:00 PM	–	4:30 PM	Collaborating Summary

Personal Assistance Services Training Introduction

Tell: The focus of our skill training is Personal Assistance Services.

Ask: What are Personal Assistance Services?

Discuss: Personal Assistance Services.

Ask: What is the role of a Personal Assistant?

Discuss: Role of a Personal Assistant.

Ask: Who do Personal Assistants work with?

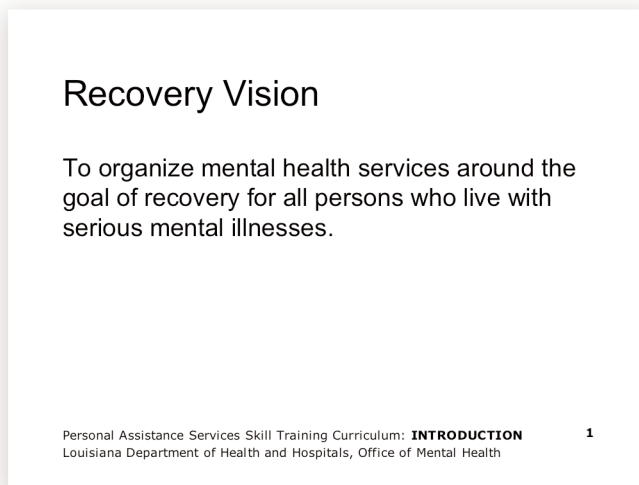
Discuss: Target population: People with psychiatric disabilities.

Ask: What experience have you had in assisting others? Who did you work with? What did you do?

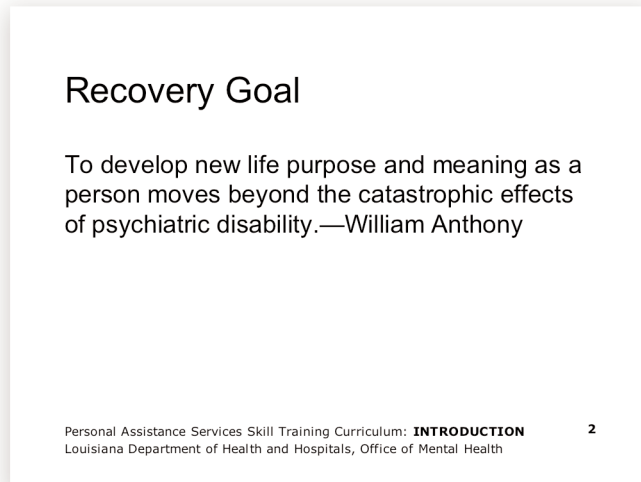
Discuss: Trainees' experiences.

Tell: Recovery is the vision for people with psychiatric disabilities.

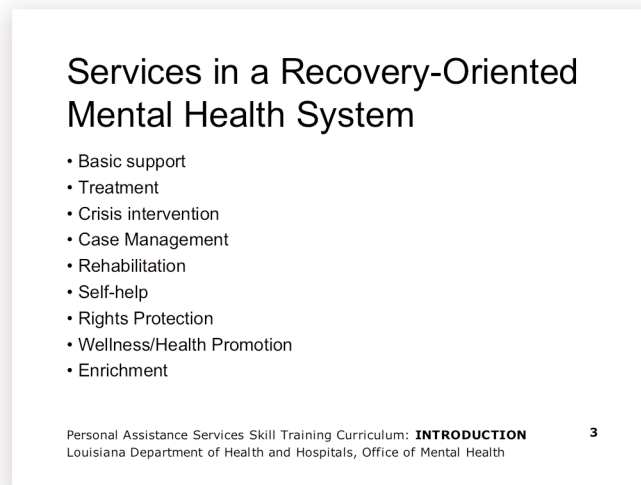
Show: Introduction Slide 1: *Recovery Vision*



Discuss: The recovery vision.

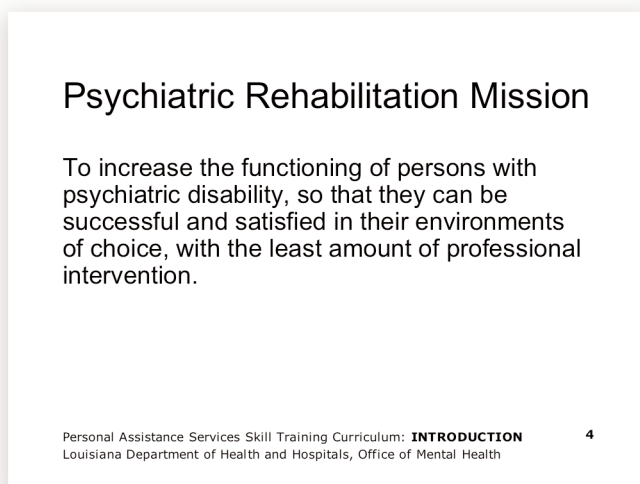
Show: Introduction Slide 2: *Recovery Goal*

- Discuss:**
- The goal of recovery.
 - Important services in a recovery-focused system (basic support, treatment, crisis intervention, rehabilitation, self-help, advocacy, wellness/health promotion, and case management).
 - Distinguish the services—in particular, *treatment vs rehabilitation*.

Show: Introduction Slide 3: *Services in a Recovery-Oriented Mental Health System*

Tell: Psychiatric rehabilitation is an important service to people recovering from a psychiatric disability. In rehabilitation, the primary interventions are developing skills and supports. Providing support is the focus of the work of Personal Assistants.

Show: Introduction Slide 4: *Psychiatric Rehabilitation Mission*



Discuss: Role of support in the recovery of people with psychiatric disabilities.

Show: Introduction Slide 5: *Psychiatric Rehabilitation Interventions*



Ask: How might a Personal Assistant support people with psychiatric disabilities?

Tell: Either by providing the support themselves or by gathering instruments of support for the person.

Ask: What are some examples of when a Personal Assistant would provide the support themselves? What are some examples of instruments of support; the types of support that a Personal Assistant may help a person acquire?

Discuss: The training format.

Tell: There are four skill sets that you will be learning during the Personal Assistance Services Skill Training.

Review: Curriculum Outline (page 2 in the Trainee Workbook)

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

Show: Introduction Slide 6: *Personal Assistance Services Skill Training Curriculum*

Personal Assistance Services Skill Training Curriculum

- Connecting
- Coaching
- Collaborating
- Managing Crises

Personal Assistance Services Skill Training Curriculum: **INTRODUCTION**
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- Tell:**
- The first set of skills, *Connecting Skills*, relates to forming a relationship with the person the Personal Assistant intends to support.
 - The second set of skills, *Coaching Skills*, is what the Personal Assistant uses to help a person through an activity; the skills involved in assisting the person to do something.
 - The third set of skills, *Collaborating Skills*, relates to the working relationship between the person and the Personal Assistant.
 - The fourth set of skills, *Managing Crises Skills*, involves handling a difficult or dangerous situation that threatens the health and/or safety of the person the Personal Assistant is supporting.

Collaborating Review

Tell: During the training, we will be focusing on the skills of Collaborating.

Ask: What comes to mind when I say “Collaborating”?

Discuss: Learners’ images and understanding of the term Collaborating.

- Tell:**
- Collaborating is working in partnership with another person.
 - In rehabilitation, the ideal is to work with a person in partnership. In a successful partnership, people work together to accomplish goals that are important to both partners. Collaboration is another word for teamwork, partnership, alliance, or cooperation. However you say it, it means working together.
 - Collaboration is a process, it is not an event. It takes time and an ongoing effort to make a partnership work. Think about partnerships in your life today.

- Ask:**
- Think of two partnerships that you admire; a personal partnership as well as a work partnership. What makes them successful? Describe the characteristics of successful partnerships. List the qualities people need to have in order to be good partners.
 - Think of two unsuccessful partnerships that you have known. What contributed to the difficulties in the partnership? What might have helped the partners to overcome their difficulties?

Discuss: The characteristics of good partnerships and the qualities of a good partner.

Collaborating Overview

Review: Collaborating Introduction (page 3 in the Trainee Workbook).

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:

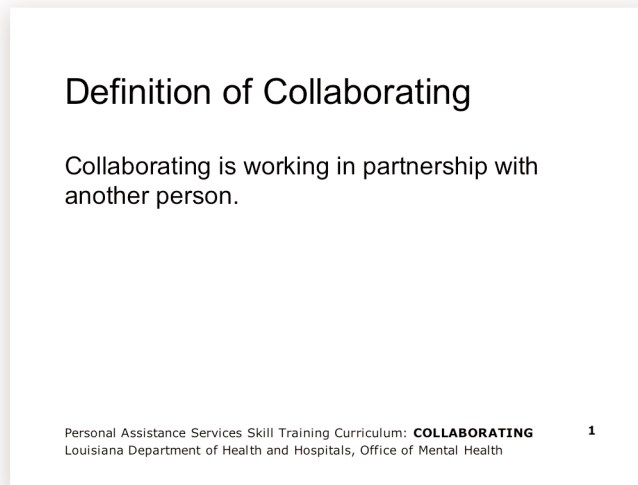
- Defining Common Goals
- Disagreeing
- Resolving Conflict

When do Personal Assistants collaborate?

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

Tell: (*What*) Collaborating is working in partnership with another person.

Show: Collaborating Slide 1: *Definition of Collaborating*



Tell: Partnership is working with another person, working together to accomplish a task. Involvement is a key value in recovery and rehabilitation and important in establishing a partnership.

Tell/Do: I'd like to show you an example of Collaborating. Turn to the Collaborating Example on pages 4 and 5 in the Trainee Workbook. Read the introduction. We need two volunteers: someone to play Matt and someone to play Mike.

Collaborating Example (page 4 in the Trainee Workbook)

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.

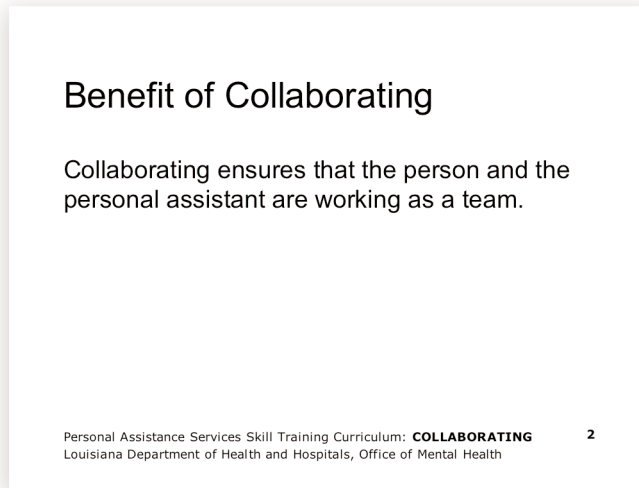
Collaborating Example (page 5 in the Trainee Workbook)

- 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.

- Ask:**
- What do you notice in this example? How did Matt and Mike collaborate?
 - Why is it so important to collaborate with the person you're working with?

Tell: (Why) Collaborating ensures that the person and the personal assistant are working as a team.

Show: Collaborating Slide 2: *Benefit of Collaborating*

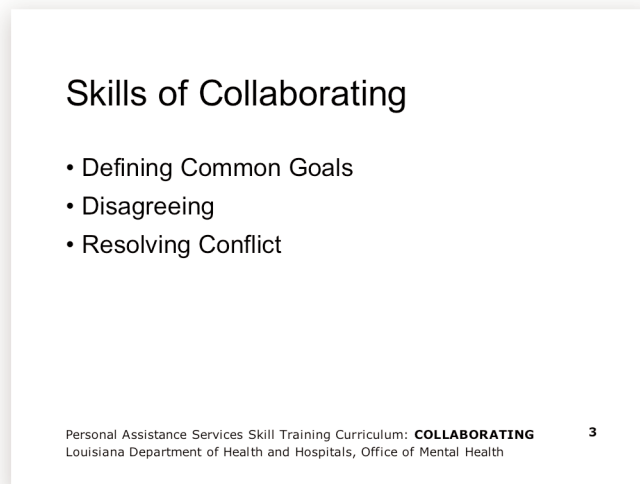


- Tell:**
- Personal Assistants work with a person. It is through teamwork that a Personal Assistant helps a person to accomplish their goals and to perform activities and tasks on their own. Collaborating or working in partnership means that both the person and the Personal Assistant agree on the focus of their work together. A person is not forced to do anything he or she is uncomfortable doing, and the Personal Assistant does not do anything that he or she is not comfortable doing. Together, they figure out what they are going to do and how and when they will do it.
 - There is a specific set of skills that help you collaborate. Write the skills on a flipchart or board.

Review: (*How*) Collaborating skills include:

1. Defining Common Goals
 2. Disagreeing
 3. Resolving Conflict
- *Defining Common Goals* is identifying the shared tasks and the timelines for those tasks.
 - *Disagreeing* is sharing an opinion that is different or contrary to the one stated by another person.
 - *Resolving Conflict* is working out differences between you and the person you are assisting.

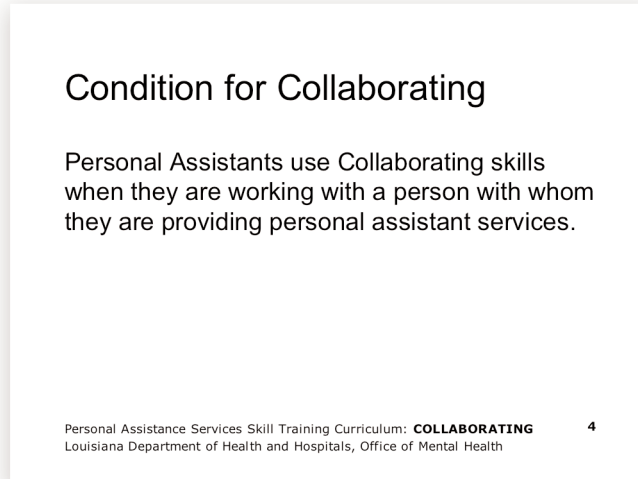
Show: Collaborating Slide 3: *Skills of Collaborating*



Ask: When does a Personal Assistant use Collaborating skills?

Tell: (*When*) A Personal Assistant uses Collaborating skills when they are working with a person with whom they are providing personal assistant services.

Show: Collaborating Slide 4: *Condition for Collaborating*



Collaborating Presentation 1: Defining Common Goals

Review: Defining Common Goals Introduction (page 6 in the Trainee Workbook)

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.

Review: There are three skills of Collaborating

1. Defining Common Goals
2. Disagreeing
3. Resolving Conflict

- Tell:**
- The first skill of Collaborating is *Defining Common Goals*.
 - Defining Common Goals is identifying the tasks to be done and the timeline for completion of those tasks.

Show: Collaborating Slide 5: *Defining Common Goals*

Defining Common Goals

Defining Common Goals is identifying the tasks to be done and the timeline for completion of those tasks.

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Tell/Do: Turn to the Defining Common Goals Example on page 7 in the Trainee Workbook. Read the introduction. Invite someone to play Sara and someone else to play Marcia.

Defining Common Goals Example (page 7 in the Trainee Workbook)

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.

Ask: What were the tasks that Sara and Marcia performed? What did you notice about the timelines?

Discuss:

- How values influence what is important to a person and influence our goals. The person's values and the Personal Assistant's values and how they may differ. The importance of the Personal Assistant being aware of their values and not imposing their values on the person.

- Distinguish common goals from other goals. For example, goals mandated by the agency or referring service, from goals that are negotiable.

Ask: • From the collaborating example, what were the tasks that Mike and Matt discussed? What were the timelines for those tasks? Review.

- Why is it important to define common goals?

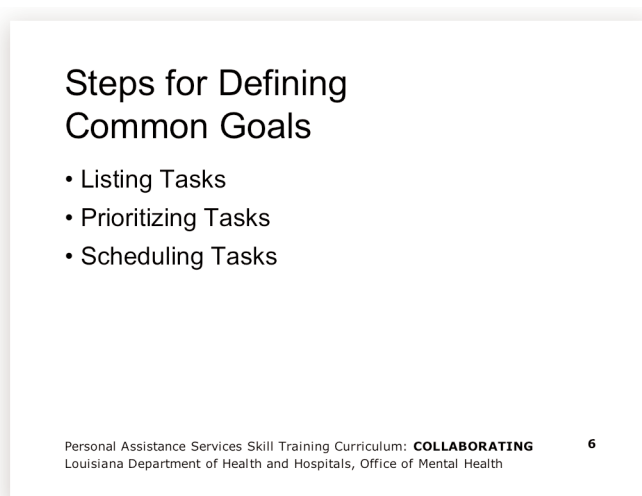
Tell: • Defining Common Goals clarifies the focus of the work between the person and the Personal Assistant.

- There are three skills in Defining Common Goals:

1. Listing Tasks
2. Prioritizing Tasks
3. Scheduling Tasks

- *Listing Tasks* is naming the activities to be done.
- *Prioritizing Tasks* is determining the relative importance of the tasks.
- *Scheduling Tasks* is determining when each of the prioritized tasks is going to be done.

Show: Collaborating Slide 6: *Steps for Defining Common Goals*



Ask: When do Personal Assistants need to define common goals?

Tell: (*When*) 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: Listing Tasks

Tell: The first step of Defining Common Goals is Listing Tasks.
Listing tasks is naming the tasks to be done.

Review: The example of Matt and Mike's Task List in Listing Tasks Description and Examples on page 8 in the Trainee Workbook. Note Matt's list and Mike's list.

Listing Tasks Description and Examples (page 8 in the Trainee Workbook)

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

Ask: What are some other examples of tasks that a person and their Personal Assistant might need to do together?

Discuss: Brainstorm—Write on a flipchart. Review the examples of tasks done with personal assistance.

Tell/Do: Turn to the Listing Tasks Exercise on page 10 in the Trainee Workbook. Complete the exercise.

Listing Tasks Exercise (page 10 in the Trainee Workbook)

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?

Tell: Discuss “tasks” from the perspective of the agency, the Personal Assistant and the person.

Defining Common Goals: Prioritizing Tasks

- Tell:**
- The second step of Defining Common Goals is *Prioritizing Tasks*.
 - Prioritizing tasks is determining the relative importance of the tasks.

Review: Turn to the Prioritizing Tasks Description and Example on page 11 in the Trainee Workbook..

Prioritizing Tasks Description (page 11 in the Trainee Workbook)

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?

- Tell:**
- If there are a number of tasks on the “to do” list, then the person and the Personal Assistant may need to weigh the importance of each of the tasks. It may not be possible to complete all of the listed tasks during one session.
 - In prioritizing tasks from most important to least important, there are a number of factors to consider:
 - Possibility
 - Urgency
 - Desirability
 - It’s a combination of all three factors that influence the weight of a particular task.

Review: Prioritizing Tasks Example on page 11 in the Trainee Workbook.

Prioritizing Tasks Example (page 11 in the Trainee Workbook)

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?

Discuss: How factors influenced the priority of the tasks.

Defining Common Goals: Scheduling Tasks

- Tell:**
- The third and last step of Defining Common Goals is *Scheduling Tasks*.
 - Scheduling tasks is determining when each of the prioritized tasks is going to be done. Scheduling involves creating a timeline for the tasks.

Review: Matt and Mike's example of Scheduling Tasks in Scheduling Tasks Description and Example on page 12 in the Trainee Workbook..

Scheduling Tasks Description and Example (page 12 in the Trainee Workbook)

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

- Tell:** The schedule names the task and includes the start time and the end time.

Steps for Defining Common Goals (page 13 in the Trainee Workbook)

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.

Tell/Do: I am going to give you an opportunity to Define Common Goals. Turn to the Defining Common Goals Exercise on pages 14 and 15 in the Trainee Workbook. You will be working in pairs. One person will assume the role of the Personal Assistant, the other the role of the person being assisted. Take a few moments before you begin to describe the person's life situation: the reasons why they need the support of a Personal Assistant at this time. Assume that your session together is 3 hours long, from 1pm to 4pm. Using the list of tasks on page 9 as a reference, follow the directions.

Examples of Tasks Done with a Personal Assistant (page 9 in the Trainee Workbook)

- 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

Defining Common Goals Exercise (page 14 in the Trainee Workbook)

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

Defining Common Goals Exercise (page 15 in the Trainee Workbook)

Prioritizing Tasks	Possibility		Urgency	Desirability
	Time Estimate	Resources Available		

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

Discuss: Experience of the exercise, learning, and challenges.

Collaborating Presentation 2: Disagreeing

Disagreeing Overview

Review: There are three skills of Collaborating

1. Defining Common Goals
2. Disagreeing
3. Resolving Conflict

- Tell:**
- Our conversation shifts to other aspects of the working relationship between the person and the personal assistant—when differences arise between them. First, we are going to talk about Disagreeing, and then Resolving Conflict.
 - Disagreeing is sharing an opinion that is different or contrary to the one stated by another person.
 - Resolving Conflict is working out differences between the Personal Assistant and the person.

Ask: How would you differentiate disagreements from conflicts?

Tell: A conflict is a series of disagreements and/or a serious disagreement.

Discuss: Different levels of intensity, magnitude between disagreements and conflicts.

- Tell:**
- Disagreements and conflicts arise in all relationships; including relationships with the people that we work with. Typically we do not seek disagreements and conflict—we don't go looking for them, but during your work with the person, certain issues may evoke differences of opinion, and at times, conflict. As personal assistants, we need to proactively address disagreements and conflict. Remember that in addition to addressing the particular issue at hand in a way that preserves the relationship, we also are creating an opportunity for the person to learn healthy ways of relating to others. Learning how to constructively disagree and/or to resolve a conflict will be an invaluable skill that the person can use in many relationships.
 - It is important to recognize what happens to us personally when faced with disagreeing with someone, when faced with conflict. We are talking about skills, but let's consider the physiological reactions you have to these situations.

Discuss: How trainees react during disagreements/conflicts. The flight or fight response. The importance of learning how to manage their own physical reactions when in such situations with a person. Situations or people with whom it is easier to remain composed; situations or people with whom it is harder.

Tell: Let's look at Disagreeing and Resolving Conflict in turn.

Review: Disagreeing Introduction (page 16 in the Trainee Workbook)

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.

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

Show: Collaborating Slide 7: *Definition of Disagreeing*

Definition of Disagreeing

Disagreeing is sharing an opinion that is different or contrary to the one stated by another person.

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Tell/Do: Turn to the Disagreeing Example on page 17 in the Trainee Workbook. Read the introduction and invite trainees to roleplay Ben and David.

Disagreeing Example (page 17 in the Trainee Workbook)

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.

Disagreeing Example (page 18 in the Trainee Workbook)

- 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?

Tell: There are three steps involved in Disagreeing:

1. Acknowledging the Person's Position
2. Stating Your Position
3. Supporting Your Position

Show: Collaborating Slide 8: *Steps of Disagreeing*

Steps of Disagreeing

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

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Disagreeing: Acknowledging the Person's Position

Tell: *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 them know what you have heard and creates an opportunity for them to explain or clarify.

Tell/Do: Turn to the Acknowledging the Person's Position Description and Exercise on pages 19 and 20 in the Trainee Workbook. Following the example, read statements in Exercises 1, 2, and 3. Write down what you might say in acknowledging the person's position.

Acknowledging the Person's Position Description and Exercise (pages 19 & 20 in the Trainee Workbook)

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 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:

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:

Disagreeing: Stating Your Position

Tell: *Stating your Position* is asserting your point of view. This is a partnership relationship. Your role is to assist the person; to support him or her in accomplishing tasks. Again, you may need to consciously pause and take a moment to compose your point of view. Ensure that your opinion is nonjudgmental and objective. Focus on the situation or the behavior, not the person. Use “I” statements. Your statement should be clear and direct.

Tell/Do: Turn to the Stating Your Position Description and Exercise on pages 21 and 22 in the Trainee Workbook. Following the example, continue with the exercise. Write down how you might state your position.

Stating Your Position Description and Exercise (pages 21 & 22 in the Trainee Workbook)

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 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:

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:

Stating Your Position Description and Exercise (page 22 in the Trainee Workbook)

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:

Disagreeing: Supporting Your Position

Tell: Supporting your Position is sharing the reasons for your point of view. Giving reasons for your position is the “because”—why you have the opinion that you do. Sharing your rationale will encourage the person to hear you, to understand your point of view, and why your opinion differs from his or her opinion.

Tell/Do: Turn to the Supporting Your Position Description and Exercise on pages 23 and 24 in the Trainee Workbook. Following the example, continue with the exercise. Write what you would say to support your position.

Supporting Your Position Description (page 23 in the Trainee Workbook)

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 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:

Ask: When do Personal Assistants use the skill of Disagreeing?

- Tell:**
- A Personal Assistant uses the skill of Disagreeing when a misunderstanding gets in the way of accomplishing the work that the person and the Personal Assistant are doing.
 - The skill of Disagreeing is used intentionally and in the moment, when the differences between the person and the Personal Assistant are hindering their work and/or their relationship.

Characteristics of a Good Disagreement (page 25 in the Trainee Workbook)

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.			✓

- Tell:**
- We choose to disagree and we may choose not to disagree. Whether or not we disagree with the person we are working with is a judgment call.
 - Turn to Deciding to Disagree on pages 26 & 27 in the Trainee Workbook.

Read: The *L.E.A.S.T.* approach.

Discuss: The different levels of intervention—*L. E. A. S. T.*

Deciding to Disagree (pages 26 & 27 in the Trainee Workbook)

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
Leave it alone	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"> • <i>Person didn't say "thank you" to a waitress.</i> • <i>Person drools on pillowcase.</i>
Eyeball it	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"> • <i>Person lights up a cigarette in no smoking area.</i> • <i>Person is talking in church.</i>
Attend to it	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"> • <i>Person refuses to help with laundry</i> • <i>Person blasts Black Sabbath every time you visit.</i>
Strategize	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.
Terminate	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.

Tell: I am going to give you an opportunity to practice Disagreeing.

Tell/Do: Turn to the Disagreeing Exercise on pages 28 and 29 in the Trainee Workbook. Read the instructions. Complete the exercise on your own and then we will discuss.

Disagreeing Exercise # 1 (page 28 in the Trainee Workbook)

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:

Deciding to Disagree Exercise # 1 (page 29 in the Trainee Workbook)

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:

Tell/Do: You will have an opportunity to practice Disagreeing in a roleplay exercise. Turn to Disagreeing Exercise # 2. Read the roleplay instructions. (Consider setting up the exercise in triads; with a person, Personal Assistant, and observer. Each could choose one of the topics, covering all three during the practice. It will be the role to lead the feedback loop. The observer will invite the Personal Assistant to go first, commenting on his or her strengths and areas of growth in relation to the skills for disagreeing, and then the person will share impressions in relation to the skills. Lastly, the observer will share his or her perspective.)

Disagreeing Exercise # 2 (page 30 in the Trainee Workbook)

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				

Collaborating Presentation 3—Resolving Conflict

Resolving Conflict Introduction and Examples

Review: Resolving Conflict Introduction on page 31 in the Trainee Workbook.

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:

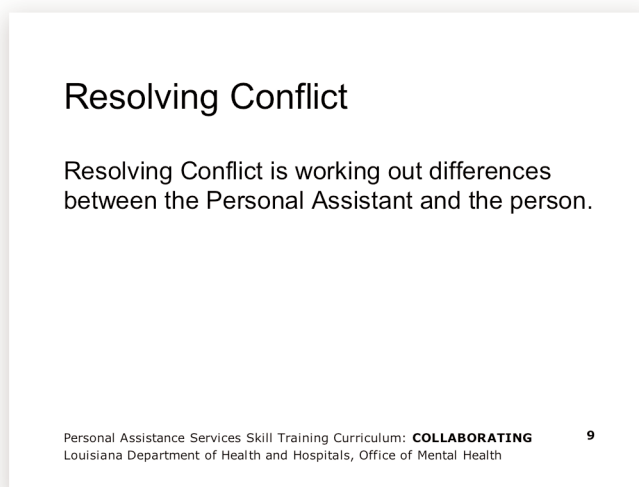
- Summarizing the Disagreement
- Identifying Shared Interests
- Finding Win-Win Solutions
- Requesting Mediation

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.

- Tell:**
- There are three skills of Collaborating:
 1. Defining Common Goals
 2. Disagreeing
 3. Resolving Conflict
 - *Resolving Conflict* is working out differences.

Show: Collaborating Slide 9: *Resolving Conflict*



Tell: A conflict is a series of disagreements and/or a serious disagreement.

Tell/Do: Turn to the Conflict Resolution Example on pages 32 and 33 in the Trainee Workbook. Invite trainees to read the description of the situation between Mike and Matt. Read and discuss how the example illustrates the *how* of Resolving Conflict.

Conflict Resolution Example on page 32 in the Trainee Workbook

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.

1. 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
Interests	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.
Values	Relationship is important Having fun	Relationship is important Having fun
Goals	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)

Ask: Why is it important that Personal Assistants resolve conflict?

- Tell:**
- (Why) Personal Assistants learn how to resolve conflict so that they know what to do when they encounter disagreements that are difficult to settle.
 - Personal Assistants are invested in preserving their relationship with the persons they are assisting. Sometimes, Personal Assistants encounter disagreements that are difficult to overcome or that repeat themselves frequently. These disagreements require conflict resolution.

- In order for conflicts to be resolved, both parties need to be invested in working through their differences with the other person. There are several critical ingredients to conflict resolution.

Tell/Do: Turn to Necessary Ingredients for Conflict Resolution on page 34 in the Trainee Workbook. *Invite the trainees to reflect on work or personal situations when they have been in conflict; situations when the trainee and/or the person they were in conflict with were not invested in resolving differences, and situations when they were. Discuss the impact on the outcome of the conflict; impact on the relationship.*

Necessary Ingredients for Conflict Resolution (page 34 in the Trainee Workbook)

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

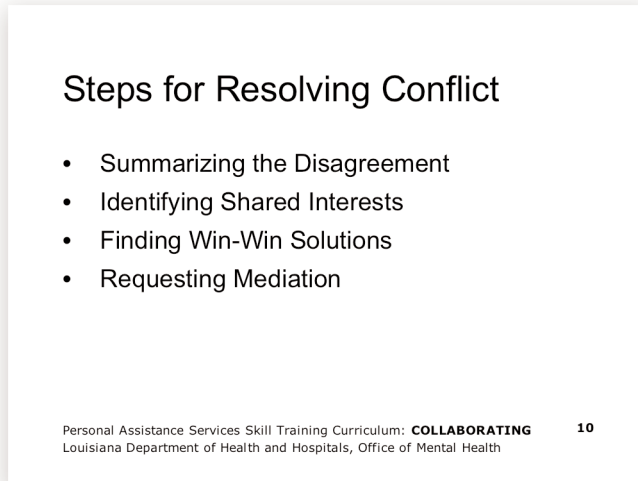
It's important to separate personality characteristics from the issues involved.

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

Tell: There are four skills in conflict resolution:

1. Summarizing the Disagreement
2. Identifying Shared Interests
3. Finding Win-Win Solutions
4. Requesting Mediation

Show: Collaborating Slide 10: *Steps for Resolving Conflict*



Discuss: How the examples reflect the skills of conflict resolution.

Resolving Conflict Exercise

Tell/Do: Turn to Resolving Conflict Exercise on page 35 in the Trainee Workbook. You will have an opportunity to practice Resolving Conflict in a roleplay exercise. You will do the exercise in pairs. Read the Directions. Refer back to Mike and Matt's example if you need a reference.

Resolving Conflict Exercise (page 35 in the Trainee Workbook)

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

Discuss: Trainees' experiences with the exercise. What they learned. How the exercise has strengthened their understanding of Resolving Conflicts.

Collaborating Summary

Review: During the training we focused on the Collaborating skill set. Let's review the key information about Collaborating.

Ask: What is Collaborating?

Tell: (*What*) Collaborating is working in partnership with another person.

Ask: What are the benefits of Collaborating?

Tell: (*Why*) Collaborating ensures that the person and the personal assistant are working as a team.

Ask: What are the three Collaborating skills?

Tell: (*How*) The Collaborating skills are:

1. Defining common goals
2. Disagreeing
3. Resolving conflict

Ask: When do you collaborate?

Tell: (*When*) Personal assistants collaborate when they are working with a person with whom they are providing personal assistant services.

Discuss: The training experience. Next skill set and training session.

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 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?

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?

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?
