



Personal Assistant Programme Board:

Personal Assistant National Training Framework

A resource for PA Employers and PAs
2024



**Self Directed
Support Scotland**
the organisation of choice

Personal Assistant National Training Framework

A resource for PA Employers and PAs



Contents

<i>Foreword</i>	3
<i>Introduction</i>	4
<i>The Vision</i>	6
Chart: PA Training Aim and Outcomes	9
Chart: Outcomes the Framework addresses.....	10
<i>Summary: how the outcomes will be met through the Framework</i>	11
<i>How the outcomes will be met through the Framework</i>	12
<i>Recommendations – infrastructure</i>	19
<i>Recommendations – future developments</i>	21
<i>Appendix 1: PA INDUCTION AND TRAINING RESOURCE PACK</i>	23
<i>Appendix 2: NEW PA MODULES</i>	25
<i>Appendix 3: TRAINING LOCATOR</i>	27
<i>Appendix 4: EVALUATION OF THE FRAMEWORK</i>	28
<i>SDS Improvement Plan Monitoring and Evaluation process</i>	30

Foreword

In introducing this robust, co-produced framework it is useful to refer to the overall purpose of the Personal Assistant Programme Board, which is to provide support so that PA Employers have a workforce that is comparable to the Social Care workforce, in terms of the parity with which it is supported. The first objective of the PA Programme Board workplan is to support the PA and PA Employer relationship. At the outset, in co-producing our workplan with employers and with the Independent Living Movement, we identified the special nature of this relationship, which is interdependent and like no other.



“need for
competently
trained &
employer-led
workforce”

Although the Independent Review of Adult Social Care supports the combination of these workforces to broaden the existing social care workforce, what became apparent in our initial sessions with members of the Board was the need for those directing their own support under SDS Option 1 to have their own workforce, their own quality assurance, their own means of development and their own bespoke suites of training.

With this in mind, what follows sets out the way by which Employers envisage training their workforce. An illustration of the strength of feeling in this regard is the response generated by the recommendation within the Independent Review of Inspection Scrutiny and Regulation in relation to the registration of PAs, promoting registration. Seen as the thin end of the wedge on the road to formal regulation, Employers and other members of the Programme Board had already represented collective views advocating for non-registration and non-regulation, to maintain the autonomy and agency of the employer.

This document sets out the means by which employers and other Board members envisage the development of a workforce which is robustly developed and monitored, without being subsumed into the existing social care workforce. It sits with other robust measures developed to support the Employer, such as the PA and PA Employer handbooks, as the need for a workforce to deliver on the demands created by pressure on the social care system elsewhere. This has resulted in an increase in Option 1 allocation. There is, therefore, more than ever, a need for a competently trained and Employer-led workforce, guided by Fair Work principles, to fulfil the challenges ahead and to fulfil the need for professional development.

This framework, grounded in co-production with Employers and other relevant agencies, gives us a solid plan for workforce improvement as well as an aspirational pretext for future funding.

Donald Macleod


Chair

Personal Assistant Programme Board

Introduction

The PA Training Framework for Employers sets out what needs to be in place to enable Employers to train their PAs in the way that suits them best. This should ensure PAs have the skills and knowledge they need to enjoy their job and do it well. This document will outline the purpose of the Framework, define what needs to be developed, how the Framework addresses these needs and recommendations to continue meeting them.

Context and Background



*“must not
undermine
Employers
choice and
control”*

Personal Assistants are individuals employed by people who choose option 1 from the 4 available options offered through the Social Care (Self Directed Support) (Scotland) Act 2013. This means people take a direct payment to design and create their support instead of being provided with support services. The payment is usually¹ used to employ a personal assistant who provides the specific support they need to be active citizens and be included in the day-to-day life of society. The [Independent Living Fund Scotland](#) (ILFS) which supplements care and support for some disabled people receiving direct payments can also provide funding for a PA through additional cash payments.

Some people employ PAs to meet their own support needs, other PA employers are family members or guardians. Personal Assistants' employment differs from other social care workers because they are directly accountable to the person who employs them. They are not regulated by the Scottish Social Services Council or accountable to a provider organisation in the way other social care workers are. The PA role, working conditions and environment are unique and central to the role is the integrity of the relationship between them and their Employer. The ability of the Employer to manage the relationship they have with their PA is critical to the success of this framework. As such, this framework must not be used to undermine this relationship or the Employers exercising of their choice and control.

The [Independent Review of Adult Social Care \(2021\)](#) acknowledged that PAs did not have the same opportunities or terms and conditions as other social care workers and recommended the alignment of PA opportunities and conditions with those of the wider social care workforce. [The Personal Assistants Programme Board](#) (PAPB) was formed in 2021 in response to the Independent Review of Adult Social Care and embarked on fulfilling the recommendations without compromising the uniqueness of the PA Employer and PA relationship or the PA Employer's choice and control.

¹ The payment can be used in other creative ways to meet outcomes agreed in the assessment process with a social worker

This Framework is the output from the PAPB subgroup on training² where engagement with a wide range of [stakeholders](#) supported voluntary training opportunities for PAs that could be accessed by PA Employers for their staff should they choose. The Framework is also aimed at people working in regulated social care with provider organisations who may be considering a PA role. The Framework recognises the value of transferable skills of staff across all social care and healthcare environments and sets out learning opportunities for practitioners to move between the different settings offering a variety of experiences unique to each setting. It is hoped this approach will positively contribute to staff recruitment and retention by offering career pathways and options for those working as PAs or in the wider social or healthcare sector to move between roles instead of leaving the sector all together.

Development of the Framework

The Framework was coproduced³ Thirty-four online consultation meetings with relevant stakeholders occurred. The stakeholders included PA Employers, Centres for Inclusive Living, Independent Support Organisations in receipt of SiRD (Support in the Right Direction) funding, Scottish Social Services Council (SSSC), Local Authorities, Social Work Scotland, Skills for Care, Highland peer support group, Mark Bates Insurance, Independent Living Fund Scotland, Promoting a More Inclusive Society (PAMIS), In Control Scotland, Inclusion Scotland and Partners in Personalisation.

An Employer reference group made up of PA Employers, including family members, has helped inform the development of ideas for the Framework.

The [themes](#) generated from collating this data along with the information from the PA Programme Board training subgroup were used to design a training [survey](#). The survey was to gather a snapshot of views from PA Employers and, with their support, the views of the personal assistants they employed.

To ensure there was no undermining of the Employer role and to ensure Employer autonomy the survey link was circulated to Employers who were invited to email it to their PAs should they wish their participation. 109 Employers and 106 PAs responded.

It consolidated the themes emerging from the consultations and other considerations for the Framework.

This Framework addresses some of these issues and topics, and the change map within shows the bigger picture – how different agencies need to work together towards the same goal.

² There are 9 subgroups each focusing on a different area: recruitment, data, networks, wellbeing, direct payment agreement, communication, peer support, steering group and training. The training subgroup led the work on the PA training Framework.

³ Co-production involves people who use services being consulted, included and working together from the start to the end of any project that affects them. Co-production is a term used to describe working in partnership by sharing power between people who draw on care and support, carers, families and citizens.

The Vision

This National Training Framework reflects the Self-Directed Support principles and values by providing choice with a menu of optional learning opportunities designed to meet the needs of each unique employment relationship.

There is strong recognition within the independent living movement that to have well-trained PAs you need to have well-supported Employers. This underpins the vision for this Framework which is twofold:

-
- 1. Employers can train their staff to provide the support they need, develop a healthy relationship, and meet their legal responsibilities as an Employer.*
 - 2. PAs have access to training and support they need to carry out their job well in partnership with their Employer.*
-

Who is the Framework for?

The Framework is a resource for Employers, their PAs, social care workers looking for PA roles and anyone considering becoming a PA. Self-employed PAs may seek training and make use of the Framework too. [Disabled People's Organisations \(DPOs\)](#) Centres for Independent Living (CILs) and [independent support organisations](#) (ISOs) can access the Framework as support tools in their work with Employers. Social workers can refer direct payment recipients to the Framework for information and access to support.

This Framework acknowledges the role that family carers and unpaid carers play in becoming an Employer for those they care for. All options created through this Framework are available to PA Employers whether they are directly employing PAs to meet their needs or if someone is employing the PAs on their behalf.

Guiding Principles

The work of the PAPB training subgroup was guided by 5 key questions supported by the independent living movement in Scotland. The questions are detailed below and were considered before reaching any decision or recommendation.

-
- 1. Will it in any way undermine the agency of the disabled person as the Employer of their own personal assistants?*
 - 2. Will it further increase bureaucracy around the employment of PAs by disabled people?*
 - 3. Is it proportionate to the issue it is trying to address?*

4. *Does it have the support of the independent living movement in Scotland?*

5. *Has it been tested with PAs and PA Employers, and does it have their support?*

The uniqueness of the relationship between the PA Employer and the PA is central to this Framework. The agency of the PA Employer is acknowledged, respected and assurance is offered that PAs will not become an extension of the general social care workforce which would compromise the model of support which has its roots in the Independent Living Movement.

Applying the Principles

Autonomy

At all times PA Employers will have autonomy and control over the training they feel is relevant for the PA to carry out their role and how that training is implemented. It is not the responsibility of the PA Employer to facilitate PA training other than that required for the role. PAs have the right to access, in their own time, any training that fits with their own desire for learning and any career aspirations. Employers recognise PAs may choose to move on and work in different settings and they can naturally support the development of transferrable skills. Employers can choose who they recruit and benefit from the training they may have received in other working environments.

Choice

All training provided or being made available is optional. Attendance at any training is not required to be a PA unless it is specifically mandated by the Employer in line with any insurance or legal requirements. Training will be determined by the skills, experience and needs of the Employer and the PA, unique to each employment relationship.

There are no formal qualifications required to be a PA however some PAs, or those considering PA employment, can pursue formal qualification in their own right or with their Employer's support. Some Employers acknowledge this can bring added benefit to the role for them while others do not. Any decision about pursuing a recognised or accredited qualification for the PA role is a decision for the Employer to make with their PA. Funding such training is a decision to be made between the Employer and the PA.

Independent Living Movement

The intention of the Framework is to maximise the skills of the Independent Living Movement through the Centres for Inclusive Living and Disabled People's Organisations. If resources allow, it is hoped they will deliver PA training locally.

Achieving the Vision

Achieving the vision that Employers can train their staff to provide the support they need, develop a healthy working relationship, and meet their legal responsibilities as an Employer requires 3 outcomes to be met.

Outcome 1	PA Employers have a range of options to finance training.
Outcome 2	PA Employers have knowledge and confidence to carry out their training role.
Outcome 3	Relevant training material is accessible to PA Employers and PAs.

Change Map

The change map below identifies the three outcomes of the Framework. How PA training is resourced is a key aspect of delivering the Framework.

Outcome 1 ‘PA Employers have a range of options to finance training’, is a responsibility that sits with the PAPB subgroup on the National Direct Payment Agreement although there is clear cross reference with the work of the training subgroup. Through Social Work Scotland and the PA Programme Board there is ongoing work to create a 13th SDS standard about Direct Payments for employing Personal Assistants under SDS Option 1. This seeks to provide clarity about what would be included in a direct payment allocation which would also address the training needs and how the funding is allocated to offer consistency and fairness across the country. There is also free training available and the opportunity to apply for funding through the [Independent Living Fund](#) (ILF).

Outcome 2 “Employers have the confidence and skills to carry out their training role” requires input and action from different agencies, funding from the Scottish Government and a willingness from all those involved to support and resource the Independent Living Movement. The Framework will address the need for information, learning and resources through a PA Induction and Training resource pack for Employers and two new PA training modules. These will be accessed via the PA and PAE handbooks and build on existing resources. Social workers can support the employers to utilise these resources to ensure they have the skills to take on option 1 in line with the requirements of the new 13th Self-Directed Support Standard.

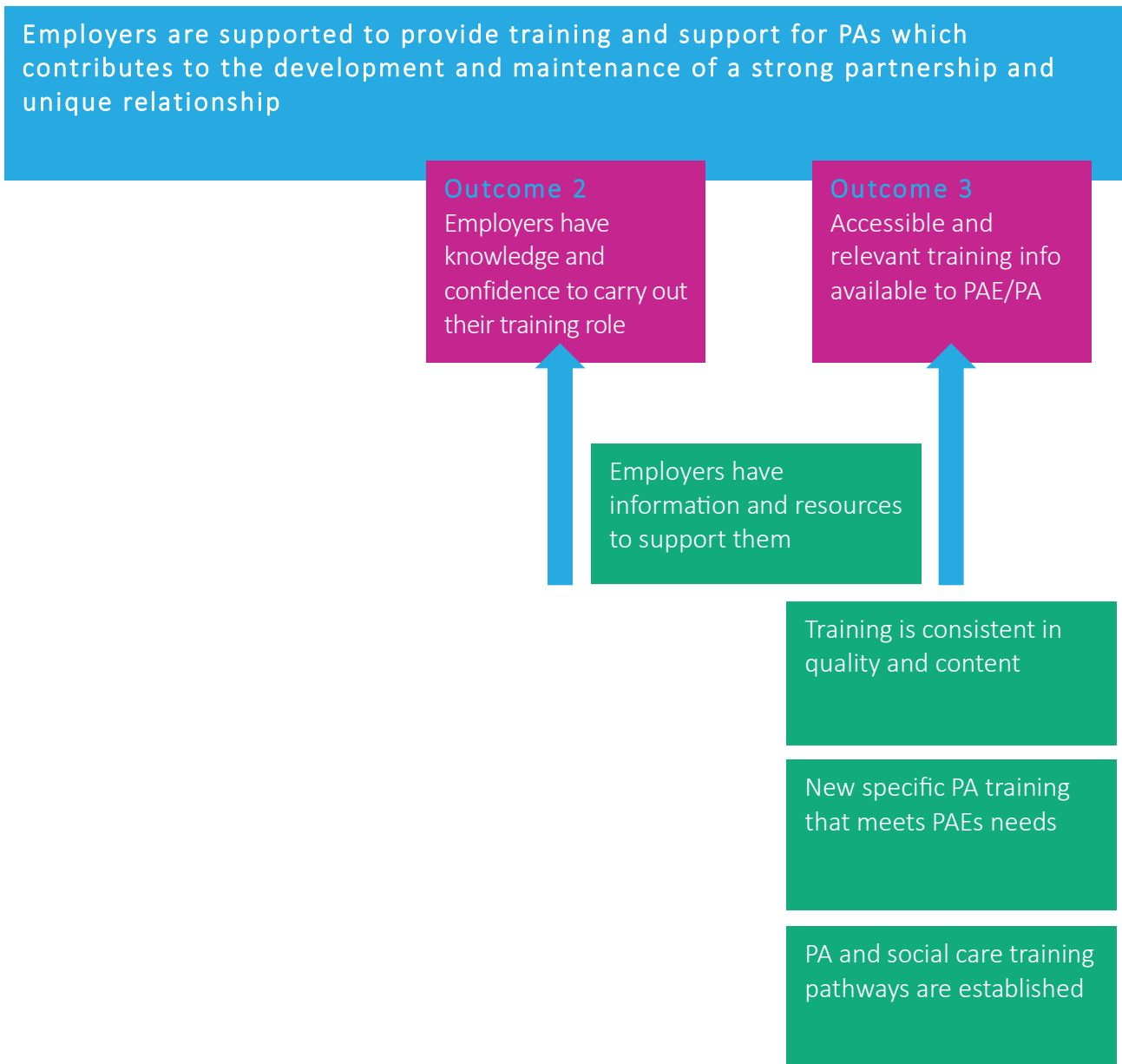
Outcome 3 “accessible and relevant training information is available to Employers and PAs”, this will also be addressed through the PA induction and training resource pack for Employers, new PA training modules and the recommendations provided. The PA/PAE handbooks will host all the new resources.

Chart: PA Training Aim and Outcomes



Chart: Outcomes the Framework addresses

The Framework focuses on outcome 2 and outcome 3 as detailed below.



Summary: how the outcomes will be met through the Framework

First here is a short breakdown of the work that will help meet the outcomes. More details on each of them is given in the next section.

1. Employers have the information and resources they need

- a. Access to a PA [induction and training resource pack](#) for use by PA Employers to develop their knowledge and confidence
- b. [The role of Centres for Inclusive Living](#), Disabled People's Organisations and Independent Support Organisations
- c. A [training directory](#), listing relevant opportunities for PAs and Employers, will be found in the PA Induction and Training resource pack, as part of the PA/PAE handbooks.

2. Training is consistent in quality and content

- a. [Guidance](#) for training topics and methods
- b. [Three standards](#) for training provision

3. New specific PA training that meets PAE needs

- a. Access to [two new modules](#) devised through coproduction with stakeholders including PA Employers and PAs.

4. Social care and PA training pathways are established

- a. Current learning opportunities in social care – [from PA to social care](#)
- b. Social care staff looking to move into a PA role – [from social care to a PA](#) role

5. Recommendations

- a. [Infrastructure](#)
- b. [Project development](#)

How the outcomes will be met through the Framework

➔ *Arrows indicate recommendations for future developments.*

1a PA Induction and Training Resource Pack

The PA induction and training resource pack will be developed as a set of tools which will give a step-by-step way of identifying and meeting a PA's learning needs. These resources will be found within the PA/PAE handbooks. Employers can choose to use them however it suits them, or not at all. The PA/PAE handbooks already offer a lot of information, which will be complemented by these practical tools.

The PA induction and training resource pack can also be part of collaborative learning and co-production between the Employer and whoever supports them including their PA(s). DPOs/CILs/ISOs can also use it to support Employers to develop their knowledge and skills.

Employers can use the resource pack to

- Increase their knowledge, skills and confidence to carry out their role in providing training for their PA and meet any legal responsibilities
- Create their own "in house" accessible and relevant induction and training information
- Develop a training budget plan
- Choose relevant training topics
- Source training (including free courses) through the training directory.

See [Appendix 1](#) for more information.

➔ *The PA induction and training resource pack will build on existing information contained in the [PA/PAE handbooks](#) by offering practical steps and templates. Practical interactive resources could also be developed to facilitate other Employer responsibilities including selection & recruitment, support & supervision, succession planning and organising your staff. Building on the existing content within the PA/PAE handbooks.*

➔ *Recruitment was highlighted through the consultations as a major barrier for Employers and the recruitment subgroup of the PA Programme Board currently focuses on this. The new [My Job Scotland Page for PA recruitment](#) and the [PA Employer handbook](#) also address many important issues for Employers. Working on further practical*

management tools could integrate current developments and provide a comprehensive resource to support Employers within their role.

1b. The role of Centres for Inclusive living, Disabled Peoples organisations and independent support organisations

Much support and training is already offered to Employers via SIRD and other funding in DPOs, CILs and ISOs. The PA Induction and Training Resource Pack will be hosted within the existing PA/PAE handbooks and be an additional tool available for 1:1 or group work.

➔ *It is recommended that DPOs/CILs and ISOs are involved in the development of new material and delivery of any new training that is produced. [See recommendations.](#)*
The capacity of CILs/DPOs must be considered as they do not cover Scotland geographically and not all of them currently are able to provide the levels of support needed for employers.
The Independent Living Movement in Scotland strongly advocates for the development of a collective which can empower disabled people. [See recommendations](#)

1c. Training Directory

A training directory will initially be a list of courses and providers, held online, that are relevant to PAs and Employers. The training directory will be linked to the PA Induction and Training Resource Pack for Employers ([Appendix 3](#)) and will be accessed through the PAE/PA Handbooks.

➔ *It is recommended that an online Training Locator be developed to improve the usefulness and efficiency of the directory. [See recommendations.](#)*

2a. Guidance for Training Topics and Methods

Information gathered from PA Employers and PAs indicated there are three key areas where training is useful and requested.

The three key topics are:

1. The PA role.

- Training should incorporate the role of PA, History of Independent Living Movement, values of person led practice
- How to have a healthy Employer/PA relationship, communication skills, managing conflict, professionalism and boundaries, confidentiality, managing endings and transitions
- Values & Principles: SDS & PA
- Working in a home environment
- Risk enablement
- Supporting your Employer

2. Specialist or medical related training required by the Employer or the supported person.

- medical training delivered by a health professional – e.g. medication and procedures.
- condition specific training – e.g. diabetes, autism, dementia, sensory impairment.
- specific certified skills – e.g. food hygiene, adult/child protection*, moving & assisting, first aid
(*although some forms of this topic exist in the social care context, it is not designed specifically for the PA/PAE relationship and requires development).

3. Rights & the Law

- disability equality, human rights, equality act, care act, Self-Directed Support rights, welfare rights.

The above topics are not intended to be an exhaustive list. They have been identified as being useful by Employers and PAs, but priorities will differ from person to person.

The PA Induction and Training Resource Pack (see [Appendix 1](#)) will include links to providers who deliver some of this training.

➔ *In future it would be useful for many existing training topics to be reviewed with a PAE/PA relationship in mind. Specifically Adult/child protection and risk enablement, followed by other topics to be prioritised by stakeholders. New material should be coproduced and delivered by CILs, DPOs and ISOs. [See recommendations.](#)*

Methods of delivery:

Engagement with PA Employers and PAs through a snapshot [survey](#)ⁱ and consultation discussionsⁱⁱ defined the methods of training PA Employers and PAs found most useful.

The most popular methods for training were:

- Self-directed online learning
- Face to Face in a group
- Shadowing


These methods should be considered in the delivery of any PA training.

Other important methods which could be considered based on needs or preferences:

- Having a trainer/specialist deliver training in Employer's home – this is particularly useful for larger teams and for practical skills such as moving and assisting or medical tasks
- Having the Employer and a specialist deliver training together – for example a medical professional and the Employer
- Reflective practice – this is where PAs write or record their reflections on a particular topic (for example communication). This is commonly used in [Open Badges](#) delivered by SSSC and SVQs (Scottish Vocational Qualifications) but could also be used by an Employer as a way to foster discussions and learning with PAs.

Train the trainer

PA specific training can be delivered locally (see [recommendations](#)) and to ensure consistency across Scotland, tutor packs should be developed.




“Boundaries and expectations need to be clarified”

2b. Three Standards for Quality and Consistency

PAs and Employers training together

Training where PA Employers and PAs train together featured as the preferred approach to training for Employers. This will help develop and improve the Employer and PA relationship and could provide peer support opportunities. There are many topics that will be useful for PAs and PA Employers to learn about together. It is also a route to making training in certain areas possible and promotes a learning culture. Providers delivering or developing training should design their training to maximise opportunities for PAs and Employers to train together. There should also be opportunities to discuss the learning between the PA Employer and the PA where appropriate and the PA Employer is happy to do so.



“develop and improve the Employer and PA relationship”

Co-production

Co-production involves people who use services being included and working together from the start to the end of any project that affects them. Co-production is a term used to describe working in partnership by sharing power between people who draw on care and support, carers, families and citizens. Training topics and content should be developed following the principle “Nothing about us without us”.

[What is co-pro? — Scottish Co-production Network \(coproductionscotland.org.uk\)](http://coproductionscotland.org.uk)

Review & Evaluation

Training delivered should be reviewed by Employers and PAs. This information should be accessible and easily shared with prospective PAs and Employers to enable choices to be made regarding the relevance and quality of a training course. See recommendations for [training locator](#).

Providers should fill in a self-evaluation form to help themselves and others ensure that the training is relevant and fit for purpose when listed on the training locator. ([Appendix 3](#))

→ *A complete set of standards could be developed as guidance for training providers in the future to ensure quality and consistency.*

3. New PA Training Modules

Two new modules for existing PAs or those wishing to work as a PA will be developed focusing on the training topics raised in the consultation process. PA Employers can encourage their PAs to participate in and complete the modules if they choose. They will be designed to encourage PAs and Employers to train together but can also be attended/completed by PAs on their own.

A self-directed online learning option and a face-to-face option for local delivery, supported by the train-the-trainer model, will be offered.

Module 1: Understanding the Role of PA

This module will give PAs (and accompanying Employers) foundation knowledge of the role of personal assistant. It seeks to give an understanding of the uniqueness of the role, its origin and importance in the Independent Living Movement and its value base. The training will introduce person-led practice in the context of Employer/PA relationship and foster discussions about key differences with social care practice.

Module 2: Healthy Working Relationships

This module will explore the different issues that may arise between Employers and PAs and how to address them. It will focus on how to set boundaries, the meaning of confidentiality, avoiding or diffusing conflict and understanding power dynamics in the relationship. The PA/PAE relationship can sometimes be fragile, and this module acknowledges the need for effective communication to maintain a healthy relationship that is mutually beneficial.

Learning outcomes for each of these can be found in [Appendix 2](#).

4a. Current Learning Opportunities in Social Care – PA to Social Care role

Currently there is no official training pathway between social care and PA roles, however training offered in each setting might be beneficial to and appreciated by a new Employer in either setting. For example, moving and assisting training or awareness of certain health conditions can be obtained in either role and beneficial to both. There is a current transferability of skills depending on what is recognised as useful to a person and their new Employer whether they are a PA Employer or Social Care Employer regulated by the Scottish Social Services Council (SSSC).

Scottish Vocational Qualifications (SVQ)

The Scottish Social Services Council (SSSC) regulate social services which presents a remarkably diverse workforce. There is a progression and structure of Scottish Vocational Qualification related to and defined by the National Occupational Standards and accredited by the Scottish Qualifications Authority (SQA).

The current SVQ mandatory units in social care are Supporting Effective Communication, Support the Health & Safety of yourself and individuals, Develop your own knowledge and practice, Support safeguarding of individuals. Learners complete these mandatory units along with optional units relevant to their area of work within the social care sector, for example adults or children.

PAs can complete an SVQ like any social care worker with the support of their Employer or in their own time. The current SVQs have been designed for a regulated workforce of Employers and staff which limits their current application to PA Employers and PAs. The SVQ system assumes that Employers have certain structures and policies in place, such as regular support and supervision. It is not designed with PA Employers in mind.

The relevance of the current SVQ to PAs will depend on the knowledge and skill of the Employer, PA, Assessor, internal verifier and external verifier and their ability to adapt the current content of the SVQ to suit. There is a link to what the SSSC recommends for PAs: [Social Services and Healthcare | SCQF 6 | National Occupational Standards \(NOS\) Navigator \(sssc.uk.com\)](#)

SSSC Induction Framework

Scottish Social Services Council have developed resources to help people explore new occupations and environments in social care. [National Induction Framework \(sssc.uk.com\)](#)

Open Badges

Open Badges are a way to collect, manage and share evidence of any type of learning in a digital format. Learners can collect them to evidence their learning and share them in places that matter to them, including offline as printable certificates.

The Scottish Social Services Council (SSSC) and dozens of other social service organisations issue Open Badges to recognise continuous and informal learning that would otherwise go unrecorded.

You do not need to be registered with SSSC to earn badges. Most of the badges are available to anyone, in any role.

Badges include reflective accounts from which you can demonstrate your understanding of a subject. They are not just a certificate of completion.

If you are registered with the SSSC, badges that include well written reflective accounts can contribute towards your continuous professional learning post registration training and learning (CPL). Explore Open Badges here: [SSSC Open Badges](#) | [SSSC Open Badges](#) | [Mozilla Open Badges available from the SSSC](#).

Development of PA-related open badges could create a pathway for recognising skills in both the regulated and unregulated workforce, however the development and accreditation of this would need to be resourced.



“recognise
and transfer
learning”

Care Certificate

The [Care Certificate](#) is made up of free resources covering the 15 minimum standards that can be covered if you are 'new to care' and can form part of an induction programme. It defines the knowledge, skills and behaviours expected of specific job roles in the health and social care sectors.

It can be helpful for PAs looking to start a career in health or social care.

It was developed jointly by Skills for Health, Skills for Care, Health Education England. It provides a useful overview with free resources but is not endorsed by Scottish Social Services Council.

4b. Social Care Staff looking to move into a PA role

For social care staff interested in moving into a PA role, no specific PA training exists currently although as discussed above, many of the topics covered within social care training could be relevant in a PA role – this would depend on the needs and preferences of the PA Employer.

Self-Directed Support Scotland have developed a handbook for PAs which will give useful information for prospective PAs: [The PA Handbook- The PA & PA Employer Handbook](#)[The PA & PA Employer Handbook](#)

The new modules being developed for PAs outlined within this Framework will be open to social care staff and other people looking to change careers. There is also information in the training directory relevant to those wishing to become a PA.

➔ *Developing a PA qualification based on the new modules being written, relevant topics suggested, useful existing material and adapting where necessary, would offer new and existing PAs a route to formally recognise their skills and experience. The training [survey](#) indicated an appetite for more formal ways to recognise PA learning. It could be accredited by a DPO to ensure that it meets the needs of PA Employers. [See recommendations](#).*

Recommendations – infrastructure

Finance for Training

Through the consultation, the survey and various meetings of the training subgroup, Employer reference group and others, it has been made clear that training needs to be resourced and considered an essential part of Employer’s budgets. Three options have emerged:

- Making training a percentage part of Employers’ direct payment to give everybody some access to individual funds.
- Creating a central fund where Employers could apply for extra funds and organisations could apply to deliver free training for PAs. This is the model used by [Skills for Care](#) in England.
- A combination of the two models

Most stakeholders favour a combination of the two models. A percentage of the direct payment allocated to training would ensure every Employer in Scotland has a minimum amount they can spend, which applies beyond “start up” costs. It places value on PA training and provides flexibility for Employers to meet their training responsibilities in a way that suits their needs.

A central fund would allow for free training to be available or training to be applied for – it would support DPOs/CILs and ISOs as providers to expand and PAs to be offered new opportunities for development. The varying costs to training providers for their services could be more easily funded. It could also allow access to a budget to cover training needs when there are unexpected staff changes and the induction and training process must begin again. It may also provide a mechanism to ensure that specialist and medical training can be accessed easily helping Employers meet their Employers liability insurance requirements.

Information on what needs to be considered in a training budget will be provided in the PA Induction and Training resource pack for Employers.

Training Delivery

The training delivery will be designed in two main formats – e-learning and face to face group sessions.

It is recommended that DPOs/CILs and independent support organisations are involved in the development of new material and face-to-face delivery of any new training that is produced.

It is also recommended that, where possible, Employers and PAs attend these sessions together to create peer support opportunities for both groups. It also nurtures the development of a mutually supportive relationship by creating space for discussion and ideas, whilst avoiding the need for additional staffing.

The capacity of CILs/DPOs must be considered as they do not cover Scotland geographically.

A “Train the trainer” model can be used to support the local delivery of new PA training modules and PA induction and training resource pack.

Peer Support Networks

Employers peer support network can offer invaluable knowledge and help to fellow PA Employers. CILs/DPOs already have champions groups, but many more are needed to fulfil the support needs of all PA Employers. The Independent Living Movement in Scotland strongly advocates for the development of a collective which can empower disabled people. Social workers are under resourced and unable to fulfil the support role required and independent support organisations are seeing more and more Employers with high support needs. Peer support networks can offer a wealth of experience and knowledge to enable Employers to fulfil their role. Further support and development of these networks is needed with consideration to groups only for Employers. Consideration could also be given to an Employer Mentoring programme.

The Personal Assistant Network Scotland is setting up Peer Support Groups for PAs in 2024 – check their website for more detail: [Home- Personal Assistant Network Scotland \(panetworkscotland.org.uk\)](https://panetworkscotland.org.uk)

Recommendations – future developments

New Training Material

The Framework is initially focused on developing two modules: Understanding the role of PA and Healthy Working Relationships, both for face-to-face delivery and e-learning formats.

In future it would be useful for many existing training topics to be reviewed with a PAE/PA relationship in mind. Specifically Adult/child protection and risk enablement, followed by other topics to be prioritised by stakeholders. New material should be coproduced and delivered by CILs, DPOs and ISOs and reflect the three standards.

New PA qualifications

Current insights from the training survey showed a demand for more formal ways to recognise PA learning. 68% of respondents chose a “nationally recognised qualification (by Scottish Qualification Authority)”.

When considering developing a new PA qualification, the following must be addressed: needs, purpose, content, delivery methods, assessment, accreditation and review.

Proposal 1 - Developing an optional PA qualification based on the new modules being written as part of this Framework would offer PAs a route to formally recognise their skills and experience. Relevant existing materials can also be used or adapted to suit the PA/Employer relationship and form part of a PA qualification. It could be accredited by a DPO to ensure that it meets the needs of PA Employers.

Proposal 2 - The existing structures for the [development of SVQ](#) and [Open badges](#) could be utilised. It would partly involve looking at where the role of PA fits in with the National Occupational Standards and whether a specific SVQ module for PAs would need to be developed. There would have to be a demand for this as it is a resource-intensive process.

Employer resource pack

The PA Induction and Training Resource pack will build on existing information contained in the [PA/PAE handbooks](#) by offering practical steps and templates. Practical interactive resources could also be developed to complement what exists and facilitate other Employer responsibilities. An Employer resource pack would include practical steps and templates for selection & recruitment, support & supervision, succession planning and organising your staff. The creation of optional open badges to acknowledge employer's skills in these areas could be explored.

Recruitment was highlighted through the consultations as a major barrier for Employers and the recruitment subgroup of the PA Programme Board currently focuses on this. The new [My Job Scotland](#) Page for PA recruitment and the [PA Employer handbook also](#) address many important issues for Employers. Working on further practical tools could integrate current developments and provide a comprehensive resource to support Employers within their role.



“support the employers to employ”

Training Locator



“make
finding good
training
easier”

The PA Induction and Training Resource Pack will provide an initial directory of training, located within the PA/PAE handbooks. It is recommended that this be developed into a Training Locator to help PAEs & PAs to source specific courses based on relevant topics, their location or the desired format (e.g. e-learning).

Work needs to be done and resourced in collaboration with the Health and Social Care Partnerships to establish what training can be offered to employers to train their PAs in each local authority so that this can be listed within the locator.

The training locator needs to provide a review function to ensure consistency in quality and content. This will make it easier for Employers and PAs to evaluate a provider’s service and allow Employers to make informed decisions about how to spend their training finance. The training providers should be responsible for updating their details and providing review and evaluation information. There should also be a function for training participants to leave their own review and comments.

Providers listed on the training locator will be expected to offer training reflecting face to face and online learning methods as appropriate to the topic. Some Employers prefer for training to happen in their home, which can be the most effective way to train larger staff teams or to tailor certain procedures to their specific needs. The provision of these training services should be clearly available.

Consideration should also be given to including some of the recommendations above into criteria required for training providers to be listed on the locator.


Training standards

A complete set of standards should be developed as specific guidance for training providers in the future to ensure quality and consistency.

This should include criteria on how these standards can be met.

The standards can be used as an evaluation tool for the Framework.

Appendix 1: PA INDUCTION AND TRAINING RESOURCE PACK



“employers
create their
own training
resources”

Section	Purpose	Content
What would I like my PA to do?	To list all the tasks the PA(s) will help with.	Ideas, examples of tasks lists. Creating your own resources by writing or recording how to do a task
What do I need from my PA?	What knowledge, skills & attitudes does my PA need to carry out the above tasks? For example, food hygiene if preparing food, non-judgmental, person led approach	Template with task and the “knowledge, Skills, Attitudes KSA” required. Examples.
What does my PA need to learn?	Looking at the KSA needed, where are the PA’s gaps? Identify what they need to learn. What is the priority? How/where will they learn it?	Table with task, need to know, priority, how learning will happen (course, shadow, video, written instructions...) Source examples
Keeping track of the learning my PA has done	It can be useful to have a record of all the learning a PA has done, for their own development and sometimes for insurance purposes.	Templates: Training Record Action Planning
Having a chat	Employer can review training done or discuss future opportunities during 1-1 catch up meetings.	Template Action Planning Arranging meetings Conducting meetings

Personal Assistant National Training Framework for Employers

Shadowing	Learning how to maximise shadowing opportunities, understanding the learner and how they learn, recording learning	Guidance Creating your own training resources by recording shadowing processes, making training videos
What training & where – training directory	To get ideas of what training to do and where to source it from. To learn what might be essential in terms of insurance.	List of relevant & useful training topics Links to a training directory Medical related training Training implied by law & Insurance
Finance for Training	To discuss and get funding for training	Training budget plan template Free training
What my PA needs to know about how I would like things to run.	It is useful to be clear on how the employer wants things to run and this clearly communicated at the start as part of an induction process. This will assist in managing expectations on both sides.	The PA Handbook outlines what can be included. How to create your own handbook: templates, making videos, ideas and suggestions for discussion (PAunwell, holidays, how to work together – likes, dislikes Link to online resources.)
Peer Support Networks	List of available networks	Links to different groups

Appendix 2: NEW PA MODULES

Two new modules for existing PAs or those wishing to work as a PA will be developed focusing on the training topics raised in the consultation process. PA employers can encourage their PAs to participate in and complete the modules if they wish.

Module 1: Understanding the Role of PA

This module will give PAs (and accompanying employers) foundation knowledge on the role of personal assistant. It seeks to give an understanding of the uniqueness of the role, its origin and importance in the independent living movement and its value base. The training will introduce person-led practice in the context of employer/PA relationship and foster discussions about key differences with social care practice.

Module 1: Learning Outcomes

By the end of the course learners will be able to:

- Explain what being a PA means
- List 3 key differences with social care workers
- Describe the values supporting the Independent Living Movement and Self Directed Support
- Discuss the challenges and opportunities of working in your employers' home
- Identify their employer's outcomes- (understanding what your employer wishes to achieve)
- Demonstrate person-led practice by taking instructions from their employer

Module 2: Healthy Working Relationships

This module will explore the different issues that may arise between employers and PAs and how to address them. It will focus on how to set boundaries, the meaning of confidentiality, avoiding or diffusing conflict and understanding power dynamics in the relationship. The PA/PAE set up can be very intense and this module acknowledges the need for effective communication to maintain a healthy relationship that is mutually beneficial.

Module 2: Learning Outcomes

By the end of the course learners will be able to:

- Explain the unique nature of the PA/Employer relationship
- Identify power dynamics within their relationship
- Address a list of questions regarding their boundaries with their employer & how they might change
- Discuss what professionalism means to them and their employer
- Demonstrate at least 2 different communication styles
- Identify areas of potential conflict and ways to prevent or diffuse it.
- Define confidentiality within the context of their role

Appendix 3: TRAINING LOCATOR

The following questions for providers are suggested to enable employers to make decisions about the relevance of training on offer.

What is the training topic?

Has it been designed for PA/PA Employer or is it aimed at social care roles generally?

What does the course cover? (content and objectives)

How long does it take to complete the course?

What methods are used? (i.e. discussions, videos, quizzes etc.)

Is the language used following the social model of disability?

Was the content co-produced with disabled people/Employers?

Is the course designed so that Employers and PAs can attend/learn together? (physical space if F2F as well as methods used)

How many learners have completed the course so far?

What recognition of learning do trainees receive? (Certificate? Accreditation?)

Can you provide access to evaluations and reviews for this course?

Appendix 4: EVALUATION OF THE FRAMEWORK

Overall aim part 1- Employers are supported to provide training for PAs

Baseline – currently we have little information on how much training employers provide for their PAs. The snapshot survey indicated a lack of confidence around identifying training needs – around 23% were not confident- and several PAs indicated having never had any training. 54% of employers said they wanted more support “to be a good employer”.

The measures of change -

- 1) PA Survey Data on training PAs have completed: before and after framework
- 2) Uptake on training from providers should increase (ask to collate as part of funding)
- 3) Employer self-reports regarding use of training- Employer survey
- 4) Increase in employers creating own training material using induction and training toolkit – question imbedded on webpage

Target date – December 2025

Overall aim part 2- Development & maintenance of a strong PA/PAE partnership

Baseline – we know that most employers and PAs have a strong unique relationship, which must be supported to flourish. We also heard in consultation that in some circumstances the relationship is strained when good conversations have not happened.

The measures of change

- Length of time in job
- Reasons for PA leaving
- How PA/PAEs rate satisfaction with relationship (PA/PAE survey)

Target date – December 2025

Key outcome 3- Accessible and relevant training info available to PAE & PA

Employers have the information and resources to support their staff

Baseline – consultation suggested employers struggle to find relevant information about training easily. Training is often not relevant or not available to PAs. 54% of employers asked for more support in the snapshot survey.

The measure of change

“What difference does it make?”

Personal Assistant National Training Framework for Employers

- Click rate and star rating on toolkit
- Number of employers supported by CILs/DPOs
- For each LA in Scotland the directory/locator can point to at least 2 providers of M&A and First Aid Training, 2 ways to access relationship skills training, 2 providers of “other” topics.
- Employer & PA survey should indicate an increase in training information available

Target date – one year after induction and training toolkit launch

Relevant new PA training that meets PAEs needs

Baseline – currently there is no PA specific training in Scotland (apart from online offering).

The measure of change

- 100% of new content developed can be related to project/consultation material
- Evaluation of training – 80% of PAs and PAEs rate the new training as relevant. Employer & PA Survey to create data.

Target date – April 2025

New training is consistent in quality and content

Baseline - Training material and format differ depending on where people live, provider etc. Employers have told us that they are looking for more consistency so that they know that the training received is of a suitable standard.

The measure of change

- Numbers of providers filling in self-evaluation questions for locator
- Evaluation of new PA module face-to-face delivery
- Implementation of the guidance and standards – questionnaire for employers and providers
- Review of the new training modules – evaluation embedded in modules for PAs and questions in employer survey

Target date – December 2025

PAAs have access to new pathways

Baseline – there are no qualifications specifically for PAs. PAs can undertake SVQs, but language and content are inappropriate. Social care staff can become PAs and often already have SVQ qualifications but have no access to PA specific training.

The measure of change

- Employment data about social care staff and PA mobility
- PA/Employer survey question about previous roles held
- SSSC data on social care staff having come from PA positions

Target date – April 2026

SDS Improvement Plan Monitoring and Evaluation process.

It will be important to include in the design of the evaluations information which can reflect what is important in the SDS Improvement Plan Monitoring and Evaluation process.

It will be important to obtain data from the evaluation methods outlined within the framework which can examine the following:

Topic	Area to evaluate
Human Rights provision in social care	Content of new PA Training Modules Training Locator includes training on this Uptake of Training
Improve Social Care Workforce	PA uptake of training & self-report on its benefit
Fair work agenda	PA have access to training through the training directory/locator Participate in training
Co-design	Implementation of the training design standards for training providers
Person Centred approach	Content of new PA Training Modules Training Locator includes training on this Up take of Training Employer self-report
Supported person and carers have choice and control over their support	Autonomy of employers to create their own training and choose suitable training. Analytics from use of resources and self-report.
Enhanced Worker skills, practice & autonomy	PA participation in training and self-report on benefit
Accessible Formats	Framework presented in accessible formats

It will be important to collate information of the data sources and complete the table below:

Data Source	Sample	Frequency of Completion	Strengths	Weaknesses

ⁱ Snapshot survey information:

- 215 responses to the survey, with almost an even split between PA Employers and PA responders.
- Almost half (45%) of PA Employers employ 3 or more PAs, 19% employ 2 PAs and 31% employ 1 PA.
- 5% employ no PAs – this may indicate they have been unable to recruit?
- Variable contracts held by PAs with 21% of PAs working less than 10 hours per week, 34% (11-20 hours), 19% (21-30 hours), 13% (31-40 hours) and 13% over 41 hours – and this will influence the amount of time spent on management and training.
- PA Employers' strongest preference was for Employer and PA training together with both PAs and PA Employers indicating a preference for online self-directed learning.
- 70% of PA/PAEs would like ad hoc training, with 50% indicating training should also be given at the start of the role.
- There was high support for 12 topics with 90% of respondents supporting 4 topics (induction to the PA role, Person-centred practice, how to have a healthy Employer/PA relationship and values and principles).
- Most PAs were confident in identifying their training needs which contrasted with only 40% of PA Employers not or only slightly confident about identifying PA training needs.
- 73% of Employers have no or insufficient budget for training
- Most PA/PAEs (68%) chose a formal qualification from SQA as the best way to recognise learning.

ⁱⁱ The following themes were recurrent in the initial stakeholder consultation:

- Recruitment was a universal problem. Pay and pay levels were consistently cited as one of the main barriers to recruitment .
- Employer Support : many people felt that in order to be able to think about training for PAs, Employers needed a lot more support with their role and responsibilities. This is

compounded when option 1 is effectively not an option but the only possibility – raises issues of capacity, duty of care and the principles of SDS.

- Budget - paying for training, cover and transport.
- Foundation training : there were some themes which were utilised in the development of the training survey:
- Employer support – There was a feeling that in fact this was the foundation of a happy PA workforce.
- Relationships – most people talked about the very unique and special relationship that Employers have with their PAs. Boundaries and expectations need clarified to avoid issues further down the line.
- The role of PA, including values and how it came to be.
- Safety and working in someone’s home.
- Hurdles were the costs, the models of delivery to suit all preferences, the variety of hours worked which make it harder to meet all needs.
- Employing family members might make it more difficult to implement training, especially if the boundaries are not clear.
- Language/medical model used is not appropriate to Employers/PAs, particularly SVQs.

Self Directed Support Scotland

Phone: 0131 475 2623

Email: info@sdsscotland.org.uk

X: [@SDSScot](https://twitter.com/SDSScot)

Website: www.sdsscotland.org.uk

Address: Norton Park, 57 Albion Road, Edinburgh, EH7 5QY

SDSS is supported by grants from the Scottish Government.

SDSS is a company registered by guarantee No SC371469
Charity No SC039587.

Please contact us to request this publication in a different format.

