

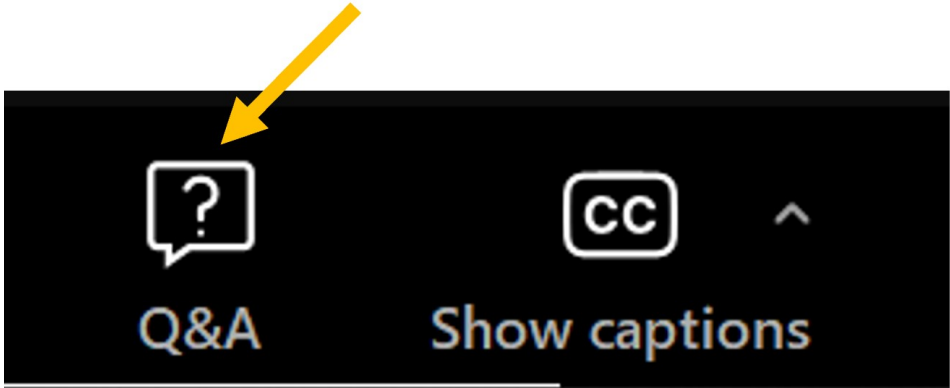


# Strategies to Assess and Meet the Needs of Family Caregivers Webinar

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July 16<sup>th</sup>, 2024, 3:00 – 4:00 ET

# Logistics



# Agenda

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1

Introductions and NCSC Background

2

Overview of Caregiver Assessments

3

Panel Discussion

4

Closing and Next Steps

# Learning Objectives

- Learn about key considerations in assessing and meeting the needs of family caregivers
- Understand federal efforts to promote the use of caregiver assessments
- Hear about successful strategies, tools and resources for implementing, administering and overcoming barriers to caregiver assessments and reassessments, as well as training and follow-up activities

# Introductions and Speakers

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## **Kathy Kelly**

Executive Director,  
Family Caregiver Alliance

## **Julie Robison, PhD**

Professor of Medicine,  
Center on Aging at the  
University of Connecticut  
School of Medicine

## **Jennifer Switalski**

Field Representative,  
Bureau of Aging,  
Connecticut Aging and  
Disability Services

## **Michelle Erdmann**

Program Manager,  
Brown County Aging &  
Disability Resource Center,  
Green Bay, Wisconsin

## **Teri Bradford**

Caregiver Specialist,  
Brown County Aging &  
Disability Resource Center,  
Green Bay, Wisconsin

# Introductions and Speakers (Continued)

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## **Administration for Community Living (ACL)**

Greg Link  
Lori Stalbaum  
Jonathan Westin

## **The National Caregiver Support Collaborative Technical Assistance and Coordinating Center**

Diana Caldwell (The Lewin Group)  
Manal Hussain (The Lewin Group)  
Leia Moran (The Lewin Group)  
Salom Teshale (National Academy for  
State Health Policy)

# 2022 National Strategy to Support Family Caregivers

- Consists of five goals and four cross-cutting themes or principles
- Frames all goals, objectives, and activities for all parties to this initiative
- All NCSC activities grounded in and informed by four cross-cutting principles:
  - Person- and family- centered approaches
  - The impact of trauma on families and family systems
  - Advancing diversity, equity, and inclusion
  - The direct care workforce



# What is the National Caregiver Support Collaborative (NCSC)?

**Purpose:** Greater recognition, support, and inclusion of the family caregivers served by the NFCSP (OAA Title III E) and the NACSP (OAA Title VI-C) and greater alignment with other efforts to improve supports to family caregivers.

## **Includes work across:**

Five grantees awarded the National Caregiver Support Collaborative grant and the Technical Assistance (TA) and Coordinating Center.

## **Target Audiences:**

Older Americans Act (OAA) aging and tribal services networks, and applicable partners, such as area agencies on aging, state units on aging, local service providers, Title VI providers, Native Hawaiian organizations, kinship organizations, or disability service networks.

## **Family Caregiver Populations Addressed:**

Family caregivers of older adults, family caregivers of individuals of any age with early onset dementia, older relative caregivers of children, older relative caregivers (including parents) of adults (age 18-59) with disabilities.



# What is a Caregiver Assessment?

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- A defined process of **gathering information**
- Includes caregiver identified **needs, barriers** to carrying out caregiving responsibilities, and existing supports of a family caregiver or older relative caregiver
- Helps **target recommendations** for appropriate support services administered through direct contact with the caregiver (i.e., home visit, Internet, telephone, teleconference, or in-person)

*Source: 2020 Reauthorization of the Older Americans Act of 1965*

# What are Family Caregiver Support Services?

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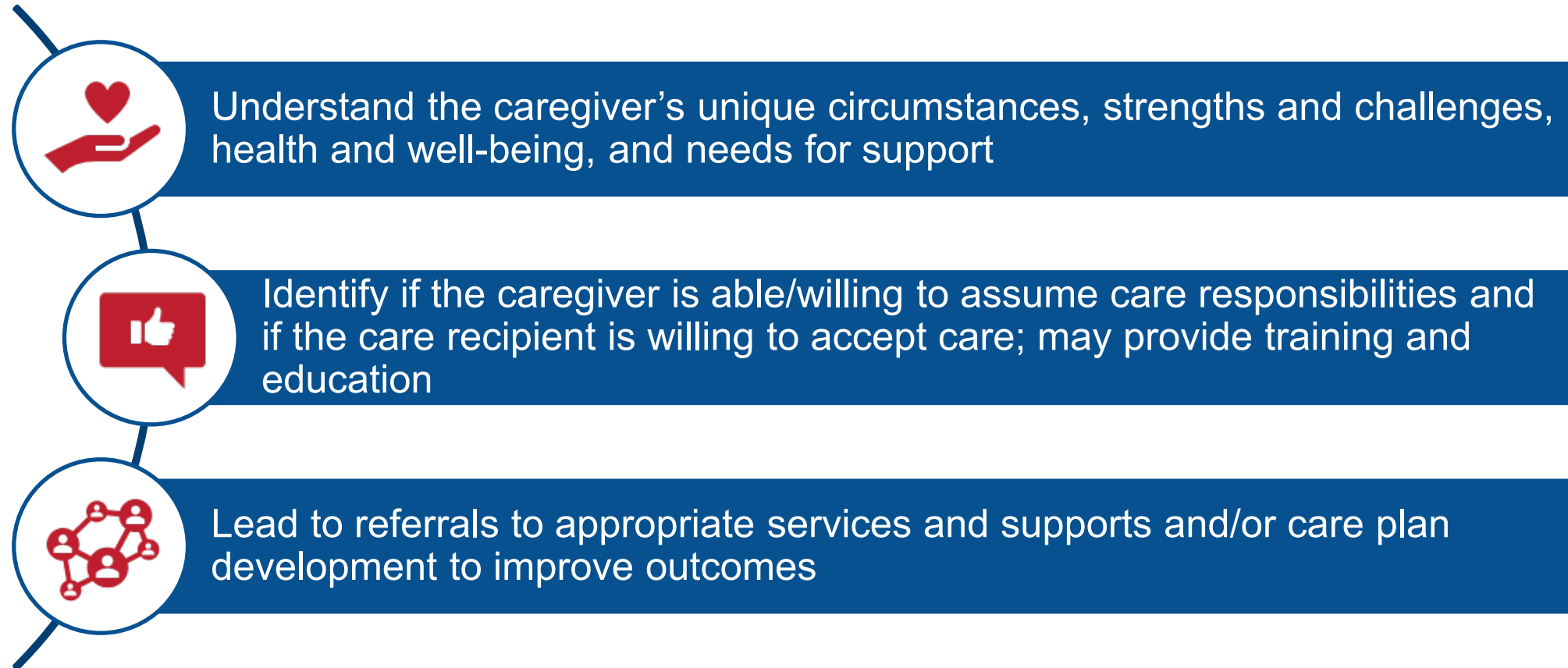


- **Community-based interventions**
- Informed through the use of an **evidence-informed** or **evidence-based** caregiver assessment”

*Source: 45 C.F.R. § 1321.91*

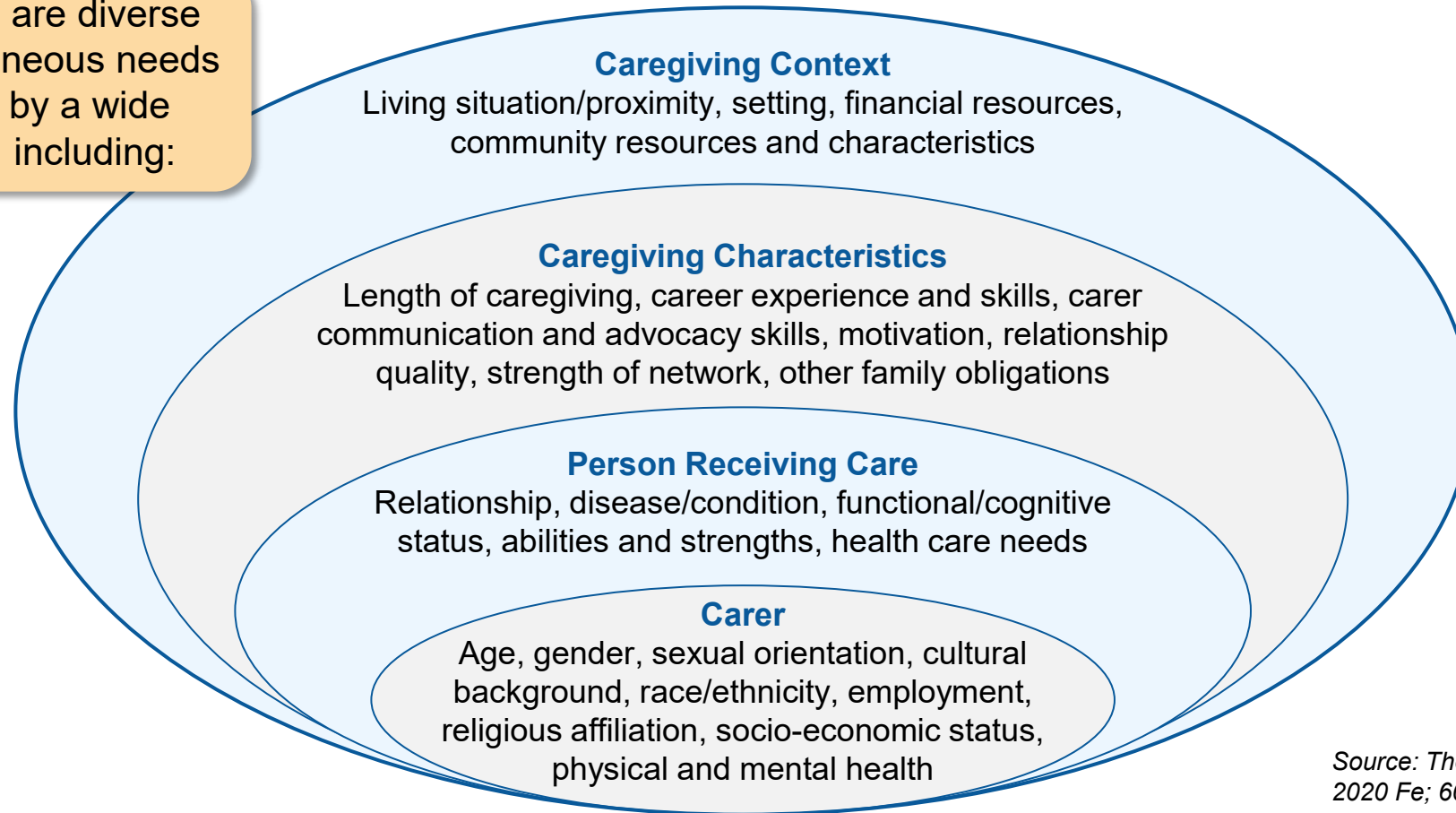
# Importance of Assessing Caregiver Needs

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# Caregivers' Unique Needs

Family caregivers are diverse and have heterogeneous needs that are shaped by a wide range of factors, including:



Source: *The Gerontologist*.  
2020 Fe; 60 (Supp 1): S14-S28

# Domains of Caregivers' Needs

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Direct Care



Care Planning



Caregiver  
Wellness



# Applying the National Strategy First Principles to Caregiver Assessment

The design and implementation of caregiver assessments should consider the following principles aligned with the national strategy to support family caregivers:



## Placing the Family and Person at the Center of All Interactions

- ▶ Caregiver assessments should incorporate person-centered approaches



## Addressing Trauma and its Impact on Families

- ▶ Caregiver assessments should be trauma-informed and promote a sense of safety, trust, and empowerment



## Advancing Equity, Accessibility, and Inclusion for Family Caregivers in Underserved Communities

- ▶ Caregiver assessments should be culturally and linguistically sensitive to and inclusive of all groups of caregivers



## Elevating Direct Care Workers as Family Caregiving Partners

- ▶ Caregiver assessments should identify opportunities for engagement with other members of the care team

# Key Domains of Caregiver Assessments

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Caregiver's  
background and the  
caregiving situation

Care recipient's  
background  
(demographics,  
financial status)

Caregiver's health  
and well-being

Care recipient's  
health and well-  
being (functional  
and cognitive  
status)

Caregiver's  
perception of care  
recipient health and  
functional status

Caregiver's skills,  
ability, knowledge or  
other requirements  
to provide care

Caregiver's values  
and preferences  
with respect to  
everyday living and  
care provision

Impact of caregiving  
on the caregiver

Resources available  
to support the  
caregiver

Resources available  
to support the care  
recipient

# Challenges/Barriers of Caregiver Assessments

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**Building a skilled workforce trained to understand the needs of the caregiver**



**Identifying and supporting caregivers who do not self-identify as a caregiver**



**Balancing best interests of the caregiver with best interests of the care recipient**



**Securing funding for staff to conduct follow-up and more in-depth analysis**



## Example State Assessments

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- [Wisconsin Family Caregiver Support Programs Caregiver Needs Assessment](#)



- [UCONN Center of Aging Connecticut Caregiver Assessment](#)

# Panel Question 1

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Tell us about your approach to caregiver assessment in your Older Americans Act funded programs. In which other programs are assessments used?

## Panel Question 2

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Tell us about which assessment tools you are using. How did you obtain that tool?

## Panel Question 3

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What type of funding is used to support caregiver assessment?

## Panel Question 4

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Tell us about how often you are conducting the assessment. How have you incorporated an equity approach to caregiver assessment?

## Panel Question 5

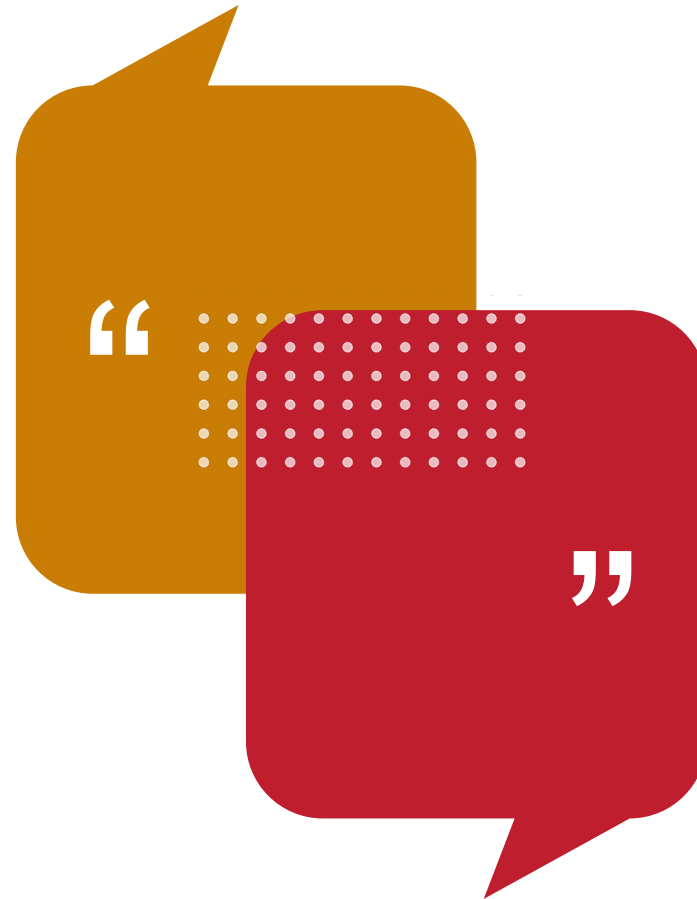
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How is the information gathered in a caregiver assessment used (e.g., to develop care plans, identify service needs, and/or shape caregiver programs and policy in your state, demonstrate impact/results)?

# Questions and Answers

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# Actionable Tools

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- **FCA's Caregivers Count Too! Toolkit**: general resource to support organizations or persons who might be new to assessing the needs of family caregivers
- **FCA's Selected Caregiver Assessment Measures: a Resource Inventory for Practitioners** offers a starting point for organizations looking to build a caregiver assessment using reliable and valid measures
- **FCA's Top 17 Resources for Family Caregivers**: provides popular caregiver support resources for organizations seeking to improve capacity for supporting caregivers
- **Wisconsin's Caregiver Support Aging Operations Manual**: outlines the program guidelines, policies, and procedures for local agencies implementing federal and state caregiver programs





# Caregiver Assessments Environmental Scan

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# Scan Overview

- 50-state scan of state caregiver assessments used in National Family Caregiver Support Programs (NFCSP)
- Reviewing caregiver assessments and supports
  - Types of questions asked in the assessment
  - Types of training available for assessors
  - Best practices from states

# Scan Highlights

- Scan is currently underway
- Brief highlights
  - Importance of training and guidance for delivering the assessment
  - Infrastructure to collect caregiver outcome and follow-up data

# National Caregiver Support Collaborative

*Building our capacity to support family, kinship, and tribal caregivers*



## Thank you for attending!



Please email questions to [Nichole.Racelis@acl.hhs.gov](mailto:Nichole.Racelis@acl.hhs.gov)



Please fill out a quick survey to provide feedback on this webinar!