



# Key Takeaways: Strategies to Assess and Meet the Needs of Family Caregivers Learning Event

July 16, 2024: 2:00-3:00 PM EDT

The Administration for Community Living (ACL) hosted their first learning event for the aging, tribal and kinship caregiver networks as part of a new initiative called the National Caregiver Support Collaborative (NCSC) on July 16, 2024. This document summarizes the event content.

## Learning Objectives

*Diana Caldwell, Director, NCSC Technical Assistance and Coordinating Center (TACC)*

- Introduced webinar 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, and training and follow-up activities

## Introduction

*Jonathan Westin, Aging Services Program Specialist, ACL*

- Provided background information on the NCSC initiative's goal to provide greater recognition and support of the older adult family, kin, and tribal caregivers served by the Older Americans Act (OAA) National Family Caregiver Support Program (NFCSP) and Native American Caregiver Support Program (NACSP).

## Overview of Caregiver Assessments

*Kathy Kelly, Executive Director, Family Caregiver Alliance (FCA)*

- Caregiver assessments are essential for understanding caregivers' unique circumstances, strengths, challenges, health, well-being, and support needs.
- Caregivers have three domains of needs: direct care, care planning, and caregiver wellness.
- Organizations can conduct assessments through home visits, online assessments, or self-administered online assessments.
- Assessments involve gathering information about both the caregiver and the care recipient, including environmental context, defined needs, barriers to caregiving, and existing supports.
- Caregiver support service interventions include programs and trainings aimed at reducing caregiver stress, loneliness, and depression, and those that enhance caregiving and communication skills.
- Organizations designing and implementing caregiver assessments should consider the cross-cutting principles aligned with the 2022 National Strategy to Support Family Caregivers.



## Best Practices in Caregiver Assessments: Panel Discussion

*Jennifer Switalski, Field Representative, Bureau of Aging, Connecticut Aging and Disability Services*

*Julie Robison, Ph.D., Professor of Medicine, Center on Aging at the University of Connecticut School of Medicine*

*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*

### Assessment Tools

- Erdmann indicated that Wisconsin uses the [Wisconsin Family Caregiver Needs Assessment](#), which includes a pre-survey and post-survey used to track changes in key areas over time.
- Switalski described Connecticut's [Caregiver Assessment](#) for OAA funded programs and the Connecticut Statewide Respite Care Program.
  - Assessment includes key domains and questions (e.g., depression screening, living environment, caregiver cognition, and behavioral needs questions) and uses a data collection system to capture and streamline data.
- Robison elaborated on current and future uses of caregiver assessments in other Connecticut programs, such as the Medicaid home and community-based services programs and the Money Follows the Person program.

### Assessment Approaches

- Erdmann noted that Wisconsin uses their assessment tool to determine short-term needs that can be addressed immediately and emphasized the importance of letting caregivers tell their story and building rapport.
- Switalski shared that Connecticut uses similar assessment domains as Wisconsin and prefers conducting assessments in the caregiver's environment, with the care recipient, to best understand their needs.
- Robison emphasized the importance of capturing data in a way that allows for assessing changes over time for Connecticut.

### Assessment Funding

- Switalski and Erdmann shared Connecticut's and Wisconsin's strategies for:
  - Combining funding streams to support caregiver services, supports, and assessments include using a combination of OAA Title III-E (NFCSP) funds, statewide initiatives, and grant funds.
  - Leveraging staff from various programs, such as aging and disability resource center specialists and state respite care managers, can improve the efficiency of implementing assessments.

### Assessment Frequency

- Bradford noted that Wisconsin conducts assessments during their first meeting with caregivers and follows up annually to determine changes in needs.

### Assessment Uses

- Bradford and Switalski explained that the information gathered from Wisconsin's assessments help inform care plans, which are flexible based on caregiver needs.
- Robison added that Connecticut also uses the assessment to help inform care managers about whether the family would benefit from enrolling in a program that supports persons living with dementia.



## Actionable Tools and Resources

- FCA's [Caregivers Count Too! Toolkit](#) is a 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 program.

## NCSC TACC Caregiver Assessments Environmental Scan

*Salom Teshale, NCSC TACC, and Senior Policy Associate at the National Academy for State Health Policy (NASHP)*

- The NCSC TACC is conducting a 50-state scan of caregiver assessments and a literature review of caregiver assessments and supports used in both NFCSP and NACSP.
- Early findings indicate the importance of training and guidance for effective delivery.
- States' processes to collect caregiver outcomes, assessment, and follow-up data vary.
- The NCSC TACC is developing technical assistance resources to be made available to programs implementing OAA caregiver programs.