



Caregiver Assessment Profile: Wisconsin

About This Series: The National Caregiver Support Collaborative (NCSC) examined caregiver assessments nationwide to identify common characteristics and elements, including assessment types, modalities, and domains. The NCSC's Caregiver Assessment Profiles feature current evidence-based, evidence-informed, and innovative assessments designed to support family, kin, and tribal caregivers. The purpose of this series is to inform states, aging networks, and tribal networks about promising practices for developing and conducting caregiver assessments. Each profile provides an overview of an assessment, highlighting key components; follow-up, evaluation, and training processes; cultural considerations; and funding sources.

Assessment Overview

The [Wisconsin Family Caregiver Support Program's Caregiver Needs Assessment](#) is a structured checklist designed to support relationship-based conversations between assessors and caregivers. Used by local aging and disability resource centers (ADRCs) and Wisconsin's 11 federally recognized tribes, this tool helps assessors identify and prioritize short-term needs for tailored support. The checklist format enables an efficient assessment process focused on gathering and documenting key information. The initial assessment findings inform a flexible individualized care plan that staff review annually to ensure it continues to address the caregiver's evolving needs.

The checklist comprises five sections: 1) Unmet Care Recipient Needs, 2) Unmet Caregiver Respite Needs, 3) Unmet Caregiver Physical Health Needs, 4) Unmet Caregiver Emotional Health Needs, and 5) Education and Resource Needs.

The National Family Caregiver Support Program (NFCSP) and the state-funded Wisconsin Alzheimer's Family Caregiver Support Program (AFCSP) actively use the assessment. It is also available as an optional assessment for the Native American Caregiver Support Program (NACSP).¹ Medicaid home and community-based services (HCBS) programs in Wisconsin do not currently administer this assessment, but Wisconsin is developing a caregiver-specific assessment for their Medicaid HCBS programs over the next two years through a grant from the Administration for Community Living (ACL).

Assessment Modalities	Modality Option for WI Assessment?
In-Person	Yes
Phone	Yes
Virtual with Video	No

Assessment Type	Properties	WI Assessment Type?
Evidence-Informed	<ul style="list-style-type: none"> Found effective through evaluation or adapted from evidence-based model Includes guidance to carry out activities Translated at least once in one or more sites 	Yes
Evidence-Based	<ul style="list-style-type: none"> Proven effective through rigorous evaluation Published results and inclusive of resources for public use Used in other settings with fidelity to the original model 	No
Innovative	<ul style="list-style-type: none"> May be effective, with some outcome data, but not yet evaluated Limited guidance to carry out activities Not yet translated in a different site or population 	No

¹ Tribes may use the assessment with AFCSP and NACSP funding, though not required.

Key Assessment Components

1. **Checklist format:** Designed as an efficient checklist, the user-friendly assessment enables assessors to capture relevant information without overwhelming the caregiver.
2. **Relationship-centered approach:** The assessment prioritizes building rapport, allowing caregivers to share their personal caregiving experiences, and focuses on the caregiver's emotional well-being. Wisconsin provides [training](#) for assessors, including [guidance](#) on motivational interviewing techniques to help assessors facilitate discussions about caregiver needs and small group sessions to practice applying these techniques using real-life scenarios.
3. **Integration across networks:** Through participation in Wisconsin's No Wrong Door system and partnerships with programs like Lifespan Respite, Wisconsin uses assessment findings to connect caregivers to tailored services and supports. Additionally, local ADRCs collaborate with the Respite Care Association of Wisconsin to identify and address gaps in respite services and supports.

Assessment Domains	Domain Included in WI Assessment?
Background on the caregiver and the caregiving situation ²	Yes
Caregiver's perception of care recipient's health and functional status	Yes
Health and well-being of the caregiver	Yes
Consequences of caregiving on the caregiver	Yes
Resources to support the caregiver and care recipient	Yes
Care-provision requirements (skills, abilities, knowledge, confidence, competencies)	No
Caregiver's values and preferences with respect to everyday living and care provision	No

Follow-Up and Evaluation

The assessment is readministered at least annually. Wisconsin conducts a reassessment as needed if there is a major change in either the caregiver or the care recipient's life. PeerPlace, an online information technology system, collects assessment data and outcome and customer satisfaction survey data. Wisconsin administers an [initial survey](#) to program participants at the time services begin and a [post-program survey](#) after six months to one year of participation, or upon leaving the program. The initial and post-program surveys measure caregiver outcomes over time, such as ability to provide care, energy and mood when performing caregiving tasks, physical and mental health, and knowledge of community resources available. Wisconsin also conducts a caregiver program customer satisfaction survey to evaluate the program's impact.

Staff Training

Wisconsin's State Unit on Aging (SUA) and the Greater Wisconsin Agency on Aging Resources (GWAAR) provide technical assistance and training to ADRCs and tribes on conducting caregiver assessments, including on-demand virtual trainings. Details are available in Wisconsin's [Caregiver Support Aging Operations Manual](#).

² According to the [Family Caregiver Alliance](#), experts in serving caregivers and researchers who focus on assessment point to the seven categories of information (i.e., domains) listed in the table to include in a caregiver assessment.

Cultural Considerations

Wisconsin provides interpreters for caregivers with limited English proficiency. Forms are available in Spanish and can be translated to other languages as needed.

Funding Source

The assessment leverages Older Americans Act (OAA) and state funds.

Learn More

Recommended Resources:

- [Caregiving Policies and Programs in Wisconsin: A Chat with Lynn Gall, New RAISE Family Caregiving Advisory Council Member](#)
- [NCSC Webinar: Strategies to Assess and Meet the Needs of Family Caregivers](#) *(includes presentation from Brown County, Wisconsin ADRC)*

Contact:

For more information on state caregiver assessments, please contact the NCSC by e-mail (caregivercollaborative@acl.hhs.gov).

You may access other Caregiver Assessment Profiles in this series on the [NCSC website](#).