



Part 1:

Identifying How Your Organization Currently Serves and Supports Caregivers

Date: 6/13/2023

Organization: Example Organization B

Submitting Personnel:

Name: Person One

Role/Title: Program Supervisor

Name: Person Two

Role/Title: Program Coordinator

For many older people trying to remain in the community, the support they receive from family and friends is the critical factor in maintaining independence. This organizational assessment tool is designed to help you reflect on areas of strength, and opportunities in your efforts to support family and friend caregivers. The assessment will require you to talk with leadership, administration, and service personnel within your organization, and to review organizational materials.

Resources

What is your organization’s current total budget and what proportion is dedicated to caregiver support/services?

For the fiscal year 2021, our organization’s budget total is \$2,939,300; 11.85% of our global budget is dedicated to caregiver support, and \$264,527 was spent on family caregivers.

What are the total dollars that your organization received from local initiatives last year (e.g., property tax mill levies, payroll taxes, sales taxes) and what proportion is dedicated to caregiver support/services?

Our organization does not receive any funding from taxations.

What revenue sources does your organization have outside of local funds, and how are those funds used for caregiver support/services?

*Older American Act(OAA) IIIB
Older American Act(OAA) IIIB-ARPA
OAA IIIB services are used for information and assistance functions, such as providing resources for family caregivers
Older American Act(OAA) IIIE
Older American Act(OAA) IIIE- ARPA
OAA IIIE services are used to assist family caregivers with respite care, as well as education including Powerful Tools for Caregiver groups.*

What staff positions are dedicated to caregiver support/services?

Our organization has 4 full-time dedicated staff that work within our Family Caregiver Program. These staff members spend around 50% of their work hours directly providing service coordination to clients. We have 1 full-time Program Supervisor who oversees the program, and 1 part-time administrative staff who assists with projects. We also have 10 staff members whose duties include providing ADRC assistance directly to caregivers who contact the ADRC looking for assistance.

What other types of organizational resources are dedicated to caregiver support/services?

Our organization has three (3) separate emergency funding sources that can assist caregivers with incidentals up to \$250. We have used this funding to assist caregivers with transportation assistance, durable medical equipment, and utility payment assistance. These funds are provided by local foundations and charitable trusts. With the increased funding through ARPA this past fiscal year, our team did “focused outreach” to family caregivers to assist in emergency disaster preparation (over the last several years, wildfires have had significant impact to our community). We were able to provide generators, emergency supply kits, and power supplies. ARPA funding also allowed us to increase the amount of financial assistance we were able to provide for respite; the yearly amount increased from \$1,200 to \$2,400.

Caregiver Philosophy

Your organization’s guiding philosophy about caregivers sets the tone for how you serve and support family and friend caregivers. As you think about your organization’s caregiver philosophy, consider the following questions:

- How does our organization define “caregiver(s)”? Who is considered a caregiver?
- Are caregivers mentioned or included in our organization’s strategic plan or mission statement?
- How does our formal leadership (organizational leadership, governing board) prioritize caregiver support/services in relation to other services and programs?
- Does our organization think of caregivers as clients?

Now, assess your organization by checking the column below that most closely aligns with the information you’ve gathered:

	We Do This Well	We Need to Improve
Our organization’s guiding philosophy prioritizes caregiver support and services.	X	

Notes/Examples (Use this space to record the information you used to make your assessment and other thoughts related to your organization’s caregiver philosophy)

Although not specifically stated, services to caregivers fall under the umbrella of our mission. Our Mission Statement is as follows: “Together we promote the dignity, quality of life, and self-determination of seniors and people with disabilities.” Within our core values, we state, “We empower caregivers to be knowledgeable and have the skills to provide quality care and thrive while providing care.”

Every four years, we develop our area plan, and one section is devoted to Family Caregivers. This includes creating goals and objectives for our program. This plan is reviewed annually to determine service gaps and new priority areas. Our Leadership’s goal is to provide service programs and resources for older adults, adults with disabilities, and Family Caregivers. We strive to prioritize our unpaid family caregivers.

Caregiver Assessment

In order to meaningfully support and serve caregivers, you must know what they need. As you think about how your organization learns about caregivers’ needs, consider the following questions:

- What is our process for assessing and/or identifying the needs of family and friend caregivers?
- What tools do we use to assess/identify caregiver needs?
- What is our process for matching caregivers with support/services?
- How do we determine if caregivers’ needs have changed?

Now, assess your organization by checking the column below that most closely aligns with the information you’ve gathered:

	We Do This Well	We Need to Improve
Our organization tailors support and services to caregivers’ individual needs.	X	

Notes/Examples (Use this space to record the information you used to make your assessment and other thoughts related to caregiver assessment.)

Our state’s Department of Human Services (DHS) provides our organization with a family caregiver intake form to use while enrolling caregivers into our program. This intake form provides information about the needs of both the care receiver, as well as the caregiver. DHS is also looking at adopting a more extensive caregiver assessment tool to assist in seeing the whole picture and how our local program can assist. A staff member is designated to be an ongoing Service Coordinator for the family to assist in finding resources and respite providers, as well as to provide system navigation. If anything needs changes, the caregiver can contact their Service Coordinator and discuss the situation and adjust services/resources as needed. We also can provide long-term care Options Counseling for the caregiver, if needed.

Caregiver Supports and Services

Now, consider all the different types of support and services your organization offers for caregivers, and assess your organization by checking the column below that most closely aligns with the information you’ve gathered.

	We Do This Well	We Need to Improve
Education/Training programs	X	
Support groups		X
Specialized programs or support groups for specific illnesses or impairments (e.g. Parkinson’s Disease, Alzheimer’s)		X
Counseling programs	X	
Coaching or navigating programs	X	
Respite services	X	

Notes/Examples (Use this space to record the information you used to make your assessment and other thoughts related to your organization’s caregiver supports and services.)

During the pandemic, our organization was not able to provide our Powerful Tools for Caregiver’s classes. We are planning to offer these classes again in the Spring of 2023, and we are in the process of getting staff members trained to be group facilitators. The goal is to offer both virtual and in-person classes for caregivers. Our organization does not offer our own support groups, but we do offer information and assistance services through the ADRC to our caregivers to find support groups within our community. Our caregivers have access to our agency’s Behavioral Health programs if they fit the criteria and need short-term behavioral health intervention, too. We also provide Long-Term Care Options Counseling to assist Caregivers navigate our state aging system.

This past fiscal year, our organization was able to provide \$2,400 dollars in respite services. We have contracts with two in-home care agencies to provide respite care. Additionally, the caregivers can be reimbursed funds if they pay a family or friend that provides respite care.

Community Collaborations

Often, family and friend caregivers are supported by more than one organization in a community. As you think about how your community, as a whole, serves and supports caregivers, consider the following questions:

- Who else provides services or support (or advocacy) to caregivers in our community?
- What formal or informal partnerships/collaborations do we have with other organizations to provide caregiver support/services?
- When we look at what our organization does in combination with other community organizations, what are the caregiving support/service gaps in our community?

Now, assess your organization by checking the column below that most closely aligns with the information you've gathered:

	We Do This Well	We Need to Improve
We maximize community collaborations to ensure caregivers in our community have adequate support and services.	X	

Notes/Examples (Use this space to record the information you used to make your assessment and other thoughts related to community collaborations.)

Our organization just celebrated its 30th year. We have an expansive provider network made up of multiple home care agencies, residential facilities, and other resource providers. We hold our home care providers to high standards of care and offer competitive pricing that we pass through to our clients. Our organization is constantly working to avoid "recreating the wheel," and we partner well with those who are already providing a service to older adults in our community. We foster many partnerships in the community to be good stewards of our property tax levy dollars and avoid duplication of efforts and services.

Gaps in services mostly have to do with personnel shortages in caring professions; we and partner agencies have experienced difficulty in filling requests since the pandemic. The same goes for mental health professionals.

Overall Self-Rating

On a scale of 1-5 (1-Needs major improvement to 5-Excellent), how would you rate the overall caregiver services and support currently provided by your organization?

**Needs Major
Improvement**

Excellent

1	2	3	4	5
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