



Part 4: Planning and Piloting the Program You Have Chosen

Date: 10/4/2023

Organization: Example Organization B

Submitting Personnel:

Name: Person One

Role/Title: Program Supervisor

Name: Person Two

Role/Title: Program Coordinator

Now that you have identified a specific program or service area that you want to work on as an organization, this part of the Organizational Assessment is designed to help you think through a detailed planning process.

Who should be included in the planning process? - Who needs to “buy in”? Who has the knowledge, skill, talent, or resources to help your program/service be successful?

Our Family Our Way

Stakeholders to include in the planning process:

Sample of end-users and the families we serve.

- *Do they see value? Are they interested?*

Organizational Leadership

- *Does this service align with organizational goals and the national strategy to support caregiver goals, and functions within the scope of our caregiver funding?*

Caregiver Program Coordinator

- *has the knowledge, skill, and talent along with shared skills and knowledge from our In-Home Care (IHC) team, and resources provided by the Learning Collaborative. “Buy in” from our IHC team is important for their experience-based input during the planning process and later for raising awareness and understanding of the service with our clients.*

Marketing

- *help to produce the product, which will be the worksheets. Their understanding of the service will contribute to appropriate promotion.*

Planning Phase

Program/Service Description - What is the program/service you are offering?

We are offering tools for families with multiple individuals who could be called upon to fulfill one or more responsibilities of a caregiver.

It will entail a condensed list of tasks to be done either daily, weekly, as needed, or just once, based on the strengths and weaknesses listed, as well as availability and level of commitment of all care partners.

It will also have an initial family meeting facilitated by a Caregiver Program Coordinator to help families delegate and divide equitably and realistically.

Program/Service Goal(s) - What do you want to accomplish with this program/service?

We want to provide a condensed version of the caregiver assessment and worksheets specifically for families who might be resistant to shared responsibilities, while also providing a pathway to the more comprehensive Our Family Our Way worksheets. The goals are to reduce stress and anxiety related to discussing a family care plan, and to increase family participation in ways they feel they can help set up families for success in their caregiving journey.

Target Population - Who will be served by the program/service? Consider income, geography, type of caregiving support needed, characteristics of person receiving care, number to be served by program, duration of contact with program/service.

Working caregivers who aren't sure how to ask other family members for help.

Accessible to people who might not have experience in a team setting. People of low income are the primary target but could also be used by middle class workers without a lot of free time or older adult caregivers who are financially secure but lacking in energy.

To be implemented after initial family meeting and with optional check-ins by Caregiver Program Coordinator at set intervals decided by each family.

Resources Needed - Start-up costs, infra-structure needs, ongoing staffing, number of personnel and training/credentials needed, ongoing financial support, marketing

Design one or two-page worksheet for assigning tasks relating to hygiene, home repair and safety, interior/exterior home maintenance, finances and general money-saving actions, nutrition, transportation, etc. as well as a backup plan if an assigned individual is unavailable.

This service can use infrastructure already in place.

Time Frame for Implementation - When will the program/service be implemented and for how long? Working backwards from your target date for serving your first caregiver, develop a detailed timeline. Identify the list of activities/tasks that need to be accomplished in order to meet your goal(s) and the timeframe of those activities. Identify the person in charge of each task.

Goal	Activity/Task	Timeline	Lead
<i>Initial Family Meeting</i>	<i>Caregiver Coordinator to launch service with facilitating an initial family meeting to help families delegate and divide equitably and realistically</i>	<i>March 2023 to December 2023, then evaluate and assess future use</i>	<i>Caregiver Program Coordinator</i>
<i>Announce new service</i>	<i>Marketing to use selected channels to announce additional service for family caregivers; Caregiver Program Coordinator to communicate additional service to active caregivers</i>	<i>February 2023</i>	<i>Marketing</i>
<i>Adjust worksheet</i>	<i>Based on feedback and experience of pilot, make any necessary adjustments</i>	<i>January 2023</i>	<i>Caregiver Program Coordinator</i>
<i>Pilot worksheet</i>	<i>Use the worksheet with 2-3 families, get feedback, assess readiness to launch</i>	<i>Months of November, December and January</i>	<i>Caregiver Program Coordinator</i>
<i>Design worksheet with marketing</i>	<i>From collected resources, layout a condensed version of the family plan worksheet and work with marketing to create final product</i>	<i>11/15/2022</i>	<i>Caregiver Program Coordinator</i>
<i>Input from In-Home Care team</i>	<i>Discuss concepts in our regularly scheduled meeting and collect insights from their perspective</i>	<i>11/1/2022</i>	<i>Community Engagement Manager</i>

Caregiving Services and Supports Organizational Assessment

Goal	Activity/Task	Timeline	Lead
<i>Green light from leadership and quality assurance</i>	<i>Check in with leadership to get go ahead with concept, verify alignment with organizational goals, which includes national strategy to support family caregivers, functions within our caregiver funding guideline, and has built in quality measures</i>	<i>Week of 10/3/2022</i>	<i>Community Engagement Manager</i>
<i>Input from potential users</i>	<i>Describe service to individuals currently attending caregiver support groups and gather their feedback</i>	<i>Months of August and September</i>	<i>Caregiver Program Coordinator</i>
<i>List of viable solutions</i>	<i>Review what the organization has done before, research similar projects</i>	<i>Week of 7/27 to present</i>	<i>Caregiver Program Coordinator</i>
<i>Identify problem</i>	<i>Actively listening during caregiver support groups raised awareness of challenges individuals have to engage family members in some capacity with caregiver duties</i>	<i>7/21/2022 to present</i>	<i>Caregiver Program Coordinator</i>

Evaluation Planning - How will you know if you are providing a quality service/program?

What outcome measures will be examined? - What do you hope caregivers will learn or gain from using your program/service? How will you know if the program/service is successful?

*Is this tool helping families delegate and divide caregiver duties equitably and realistically?
Is it helping to reduce stress associated with discussing caregiver roles?*

Data Collection - What data will you collect to evaluate program performance? How will you collect program data? (e.g., surveys, questionnaires, focus groups, interviews)

*Interviews - verbal feedback from families in real time and with follow-up touch base communications.
Annual caregiver program survey.*

Quality Monitoring - What quality measures have you included in your program/service design?

We are working with our Quality Improvement Supervisor on quality measures, something more than the number of people served and anecdotal feedback.