



## Part 1:

### Identifying How Your Organization Currently Serves and Supports Caregivers

**Date:**

**Organization:**

**Submitting Personnel:**

**Name:**

**Role/Title:**

**Name:**

**Role/Title:**

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?**

**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?**

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

**What staff positions are dedicated to caregiver support/services?**

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

**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:

	<b>We Do This Well</b>	<b>We Need to Improve</b>
<b>Our organization’s guiding philosophy prioritizes caregiver support and services.</b>		

**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)

**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:

	<b>We Do This Well</b>	<b>We Need to Improve</b>
<b>Our organization tailors support and services to caregivers’ individual needs.</b>		

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

**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.

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

**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.)

**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:

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

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

**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**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
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