



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?

*Total organizational budget = \$11,498,731
CG budget = 0.91%
CG Actual expenditures = 0.79%*

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?

*Total levy funds for 2021 = \$9,708,685
CG program received \$61,995 from Title III
Total actual expenditures = \$90,424
Difference (covered by levy funds) = \$28,429
Percentage of levy dollars = 0.29%
We do not allocate overhead costs, such as utilities, phone, internet, depreciation to caregiver, etc. at this time. If we did, the Caregiver Cost Center expenditures would be higher.*

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

Title III E federal funding (passed through the Area Agency on Aging) for caregiver support pays for all caregiver department costs, including staff salary and fringe. In an average year, we exhaust the funds in October (about \$60,000).

What staff positions are dedicated to caregiver support/services?

Our organization employs one full-time Caregiver Program Coordinator whose responsibilities are to run all aspects of the caregiver program. This includes, but is not limited to: teaching Powerful Tools for Caregivers, facilitating support groups, working with caregivers one-on-one (in-person or over the phone), creating educational and recreational opportunities for caregivers and their loved ones, and coordinating the volunteer caregiver relief (respite) program.

Other staff that contribute to this program include the Community Engagement Manager, Community Education Coordinator, and some occasional assistance from other community programs staff members.

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

Our in-home care department consists of Information and Referral Specialists who explain programs/resources during phone calls, and perform intake when families are interested in services that may reduce the burden felt by caregivers (e.g., Meals on Wheels). Once a care receiver is screened in, they are assigned a care consultant (social worker) to meet with the client and their family caregiver to assess needs and connect with services. The relationship of our in-home care and caregiver programs is bi-directional and the social workers refer family/friend caregivers to our caregiver support program. Likewise, if a caregiver and their loved one could benefit from additional services, the caregiver program may refer them to in-home care.

Some special programming specific to caregivers and their care receivers is put on each year by our fitness, education, arts, social, and other programming staff (e.g., online fitness class specifically for caregivers).

Our operations and communications teams also support our caregiver program to create safe and clean spaces for groups and educational offerings, and to get the word out in our community about caregiver supportive services and programs we offer.

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)

Our organization defines a caregiver as anyone who provides support to a friend or family member who needs assistance performing instrumental activities of daily living or activities of daily living to continue to live a high quality of life.

Caregivers are not expressly referred to in our organization’s mission statement, although their presence is implied. Many caregivers we serve are 55+, but we also serve those younger than 55 who help a loved one who is 55+. See below:

Our organization is the most comprehensive aging services provider in the county. We provide adults ages 55 and older with in-home care services – such as Meals on Wheels and personal care – to help seniors live independently at home. We also offer hundreds of community programs on-site in our enrichment center and off-site throughout the county to promote health and wellness for older adults and caregivers.

Our leadership prioritizes caregiver services highly because we know the importance and value of unpaid family caregivers. We have had unwavering support of our caregiver program as it has grown over the last 5 years to focus on the caregiver as the client rather than secondary to their loved one enrolled in our in-home care services.

Our caregivers may very well also be clients of our in-home care team. That being said, whether their loved one is a client or not, when someone is enrolled in our caregiver program, from that standpoint, the caregiver themselves is the primary client.

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 caregiver intake/enrollment process is more informal and does not include an intake form/assessment/survey. We employ active listening and steer caregivers to resources that may help them with their specific concerns/situations. For example, for a caregiver who expresses being burnt out caring for a loved one with dementia, we may refer them to Alzheimer’s Association, Adult Day programming, or respite care options. We tailor our suggestions to their specific needs, but it is an informal process to identify those needs and track them for changes over time.

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.)

Education/training: PTC, Caregiver Crash Course, external partner expertise programs. We are missing personal care and hands-on training.

Support groups are offered in-person around the county and at our headquarters location, as well as online. We also offer peer-led groups and a private Facebook group (available 24/7).

We strive to have relationships with other organizations to offer specialized support for specific illness caregivers (e.g., Alzheimer’s Association holds groups for caregivers caring for persons living with dementia). Our organization offers general support groups for caregivers and does not plan to specify.

Counseling: We have relationships with counseling services and are able to refer caregivers who could benefit from counseling to appropriate resources/departments.

Coaching/Navigating: our organization offers some educational programs to help caregivers navigate their caregiving journey.

Respite: We have both professional and volunteer respite programs available. Our partnerships with respite providers include ability to access Adult Day Care Services, in-home respite, or institutional respite for their loved one.

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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