



Prepare to Care

A Planning Guide for Caregivers

Look inside for:

5 Key Steps for your Caregiving Journey

General Needs Assessment to help
evaluate your situation

A Simple Goals & Needs Checklist





Caring for a family member or close friend is one of the most important roles you'll play. It may start with driving your loved one to get groceries or to the doctor. Later, you may find yourself taking more time off from work, preparing meals or handling bills.

No matter where you are in the process of family caregiving, having a good framework to help guide both you and your loved one will make it easier.

We've outlined five important steps to help support you and your loved one in your caregiving journey along with a General Needs Assessment (pages 6 & 7) and a Goals & Needs Checklist (page 11) to help you evaluate your specific caregiving situation.

We hope the information, resources and checklists in this guide will help you get organized and provide the support that you need along the way.

STEP 1) START THE CONVERSATION

Many people wait until a crisis occurs before they talk with their loved ones about important issues like healthcare preferences or finances. A lot of uncertainty can be avoided if you talk with your loved one before something happens. It's not always an easy conversation, but here are some tips to start the dialogue.

Look for an opening

You might use an article you've read or something you saw on the news to raise the topic of future care. Try not to anticipate what your loved one might say or how they will react. Just get the conversation started. Express your love and concern and, most importantly, listen.

Respect your loved one's wishes

A family caregiving plan should never be made without the participation, knowledge and consent of your loved one. Once you've started the conversation, you may wish to bring in a few other trusted family members or friends to be part of the process. It is also helpful to engage outside help, like a social worker, minister, doctor, lawyer or financial advisor.

Size up the situation

Figuring out what your loved one's priorities are such as where they want to live or the nature of the care they will need will help determine the next steps. Your loved one may be hesitant to share the details of their finances or health, but if you approach them with respect and explain your intentions, the conversation will likely be smoother.

Review finances

Money can be a particularly sensitive subject, but it's often at the heart of many decisions you'll need to make with your loved one about housing, health care and other expenses. Ask them to review their bank accounts, investments, insurance coverage, and loans. Find out whether they have long-term care insurance and funds or assets that can be used to cover potential care needs.

Counter resistance

Your loved one might say, "I just don't want to talk about it." Some people are private by nature. It's also hard for some people to admit they need help, especially if it's from their own children. If your conversations don't go well, ask a trusted family friend, doctor or faith leader to approach them about your unease.

STEP 2) FORM YOUR TEAM

Caring for a family member or friend is too big of a job for one person. Trying to do everything yourself may lead to burnout and problems with your health and well-being. Instead, form a network of friends, family and community resources that can help you with your loved one's care. Putting a supportive team together can strengthen both you and your loved one's ability to deal with any issues that emerge.

Look for team members

Team members need not live nearby or have huge blocks of time to be of value. Family or friends living at a distance or with limited time can pitch in behind the scenes with meal organizing, bill paying or financial assistance. You may feel hesitant to ask others for help, but some people may need only a little encouragement to take on a task—and they may even feel left out if they are not asked. Be specific about the type of assistance needed, as many people just don't know what to do.



STEP 3) MAKE A PLAN

Putting together a family caregiving plan now will help you respond more quickly and effectively should the need arise. It can also provide some peace of mind. A plan helps get everyone on the same page and keeps the focus on what's best for your loved one.

Get started by filling out the General Needs Assessment on pages 6 and 7 and the Goals & Needs Checklist on page 11. Once you've gathered this information, here are some tips to create a plan.

Gather your resources

Explore the options available in the community and bring in team members to help manage the workload. Be sure to ask your caregiving team members about their preferences for who does what task. Assigning tasks can take place in a face-to-face family meeting, over a conference call or through email.

Think both short and long term

The plan should include both immediate and future needs. Options for addressing needs will depend on finances, the willingness of your support team and the availability of community resources and services.

Communicate with the team

Set up a system for communicating with everyone on the team. The point person should be well organized and an in-depth planner who can work through possible conflicts between team members.

Document your plan

A written summary of the plan can reinforce your loved one's wishes and needs and make sure everyone is working toward the same goals.



General Needs Assessment

(One for each individual who will need care)

Area of Need	Types of Possible Tasks	Point Person
Home Maintenance and Living Situation	<input type="checkbox"/> Pay rent/mortgage	<input type="text"/>
	<input type="checkbox"/> Home repairs/modifications	<input type="text"/>
	<input type="checkbox"/> Ongoing maintenance	<input type="text"/>
	<input type="checkbox"/> Safety concerns	<input type="text"/>
	<input type="checkbox"/> Grocery shopping & meal preparation	<input type="text"/>
	<input type="checkbox"/> Lawn care	<input type="text"/>
	<input type="checkbox"/> Pet care	<input type="text"/>
	<input type="checkbox"/> Housekeeping	<input type="text"/>
	<input type="checkbox"/> Research alternative living situations	<input type="text"/>
	<input type="checkbox"/> Other:	<input type="text"/>
	<input type="text"/>	
Financial Affairs	<input type="checkbox"/> Paying bills	<input type="text"/>
	<input type="checkbox"/> Keeping track of financial records	<input type="text"/>
	<input type="checkbox"/> Managing assets	<input type="text"/>
	<input type="checkbox"/> Applying for and supervising public benefits	<input type="text"/>
Transportation Needs	<input type="checkbox"/> Driving decisions	<input type="text"/>
	<input type="checkbox"/> Coordinating rides	<input type="text"/>
	<input type="checkbox"/> Locating transportation services	<input type="text"/>
Personal Care	<input type="checkbox"/> Coordinating personal care activities	<input type="text"/>
	<input type="checkbox"/> Help with daily grooming and dressing	<input type="text"/>
	<input type="checkbox"/> Clothes shopping	<input type="text"/>



General Needs Assessment

(One for each individual who will need care)

Area of Need	Types of Possible Tasks	Point Person
Health Care	<input type="checkbox"/> Monitor and record physical and emotional symptoms	<hr/>
	<input type="checkbox"/> Arrange medical appointments, transportation, and someone to accompany as needed	<hr/>
	<input type="checkbox"/> Submit medical insurance and bills	<hr/>
	<input type="checkbox"/> Explain medical decisions	<hr/>
	<input type="checkbox"/> Medication management (fill prescriptions, fill pill boxes, give reminders and dispense medications)	<hr/>
	<input type="checkbox"/> Perform medical tasks (wound care, injections, and catheter)	<hr/>
	<input type="checkbox"/> Obtain medical bracelet and/or medical alert system if needed	<hr/>
Communications	<input type="checkbox"/> Keeping family caregiving team informed	<hr/>
	<input type="checkbox"/> Coordinating team visits	<hr/>
	<input type="checkbox"/> Daily check-in	<hr/>
	<input type="checkbox"/> Obtain cell phone and/or Internet to enhance communication	<hr/>
Socialization	<input type="checkbox"/> Sending greeting and thank-you notes	<hr/>
	<input type="checkbox"/> Arranging for visitors	<hr/>
	<input type="checkbox"/> Arranging outings	<hr/>
Adaptive Devices	<input type="checkbox"/> Ordering, maintaining and paying for adaptive devices	<hr/>
	<input type="checkbox"/> Training on how to use devices	<hr/>
	<input type="checkbox"/> Other: _____	<hr/>

STEP 4) FIND SUPPORT

Many issues may arise during your caregiving experience that require additional help. Don't hesitate to reach out to organizations and professionals with experience in helping family caregivers.

Locate community resources

A variety of support services are available to care recipients and their caregivers. Your local area agency on aging can typically help connect you to services such as home-delivered meals, transportation, adult day services centers, care management, and more. Check into the assistance offered in your community through the Eldercare Locator at **www.eldercare.gov**.

Hire help

If you see that your loved one needs help with daily activities, you can explore the range of home care services available. A nurse or social worker can help you determine what is needed, find services and arrange and monitor the care. Some home care workers do housekeeping, meal preparation, laundry, and shopping. Others provide more hands-on help with bathing, dressing, and transferring from one position to another, which may require certification.



Secure safety

The main goal is to help your loved one stay as independent as possible and in their own home. If they have more difficulty getting around or their vision or hearing fades, some simple changes can be made to make the home safer. Handrails, grab bars, night-lights, and adjustable shower seats can make a house safer and more comfortable. Here's a link on smart solutions to making your home more comfortable for your loved one: **www.aarp.org/homefit**.

Find housing with supportive services

If your loved one has decided that they would prefer to live in a new residence that combines housing with support services, you can look into the variety of housing options that may be available in your community. Begin by making a list of criteria, such as location, group dining and laundry service.

STEP 5) CARE FOR YOURSELF

As a family caregiver, it's easy to forget about your own needs. Balancing caregiving with work and other family obligations can be stressful. Keeping up your energy and maintaining your health are critical in order to care for others. It's just as important to make a plan to take care of yourself as it is to create a caregiving plan for others.

Recognize your emotions

How you came into the role as a caregiver can influence how you feel about the experience. Perhaps you are very close to your loved one and you see this role as your chance to give in return the loving care they gave to you. Others may have been pushed into the responsibility and feel resentful because they are stretched thin. However you arrived to this responsibility, it's helpful to recognize your emotions.

Take care of yourself

Allow yourself to take a break. Tend to your own needs such as exercise, sleep and healthy eating. Find ways to reduce your stress and make sure to take time to have fun!

Work and caregiving

Many of those who are caring for a loved one are also in the paid workforce. Find out if your company has policies or programs to support caregivers. Think about taking advantage of flextime or working from home to help open up your schedule. If you need more time off, consider asking your employer whether you are covered by the Family and Medical Leave Act.

Connect with Other Caregivers

Caregiving can be very isolating, but a caregiver support group in-person, or online may give you ideas about other strategies and resources available to lighten your load. Find support and connect with other caregivers online at www.aarp.org/caregivingcommunity.



RESOURCES

AARP Family Caregiving

www.aarp.org/caregiving or 877-333-5885. Your one-stop shop for tips, tools and resources while caring for a loved one. For Spanish resources visit **www.aarp.org/cuidar** or call 888-971-2013.

AARP Advance Directive Forms

www.aarp.org/advancedirectives

Free, downloadable state-specific advance directive forms and instructions.

AARP Care Guides

www.aarp.org/careguides Take the stress out of caregiving with these targeted, easy-to-use guides.

AARP Local Caregiver

Resource Guides

www.aarp.org/caregiverresourceguides Local resources that help make caregiving easier.

AARP Caregiving Tools

www.aarp.org/caregivingtools AARP's suite of web-based tools will help you find services, keep track of health records and more.

AARP Medicare Q&A Tool

www.aarp.org/MedicareQA

An easy-to-use online tool that provides answers to frequently asked questions about Medicare.

AARP I Heart Caregivers

www.aarp.org/iheartcaregivers

Share your caregiving story and connect with others.

AARP Online

Caregiving Community

www.aarp.org/caregivingcommunity Join our community & connect with other caregivers like you.

Federal Aid Programs

www.aarp.org/federalaidprograms Information on how the federal government may be of benefit in your caregiving journey.

AARP's Caregiving Books

www.aarp.org/caregivingbooks

Celebrate life and family memories, find the resources to care for a loved one, get tips on moving and downsizing, and more.

AARP Wallet Cards

www.aarp.org/walletcards

Free, downloadable wallet cards to help family caregivers from the moment their loved ones go into the hospital to when they return home.

Caregiving Advocacy

www.aarp.org/supportcaregivers Across the country, AARP is working with governors, state legislators, and community partners to take commonsense steps to support America's 40 million family caregivers.

Goals & Needs Checklist

Use this list to start the conversation about what is most important to your loved ones and what strengths they bring to bear.

Goals

- ___ To remain healthy and active
- ___ To stay/move near family
- ___ To remain in my own home for as long as possible
- ___ To stay active with religious or community groups
- ___ To maintain hobbies
- ___ To be around people
- ___ To move to a residence with support services
- ___ To move to a more accessible home (one story or apartment with elevator)
- ___ To be financially secure and/or to budget for future needs
- ___ To travel/visit home country
- ___ Other:

Strengths

- ___ Able to advocate for self
- ___ Adequate savings and/or income
- ___ Low-maintenance single-story home
- ___ Family and friends nearby
- ___ Relationships with family
- ___ Other:

Needs

First determine if there is an immediate need under each area. If there is not a pressing issue, prioritize the tasks to be addressed and develop a timeline.

Family Caregiver Resources

Visit the AARP Family Caregiving site
for information, tools and resources
for caring for a loved one at

www.aarp.org/caregiving
or call 877-333-5885

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