



## Webinar Summary: Strategies to Assess and Meet the Needs of Family Caregivers

*Hosted by the Administration for Community Living*

*July 16, 2024: 2:00-3:00 PM EST*

### Webinar Background and Overview

The Administration for Community Living (ACL) hosted their first webinar as part of a new initiative called the National Caregiver Support Collaborative (NCSC) on July 16, 2024. The webinar aimed to address the following participant objectives:

- Learn about key considerations in assessing and meeting the needs of family caregivers
- Understand federal efforts to promote the use of caregiver assessments
- Hear about successful strategies, tools and resources for implementing, administering, and overcoming barriers to caregiver assessments and reassessments, and training and follow-up activities

### Welcome and Introductions

Representatives from The Lewin Group, who support ACL as the NCSC Technical Assistance and Coordinating Center (TACC), introduced the webinar's featured speakers, including:

- Kathy Kelly, Executive Director, Family Caregiver Alliance (FCA)
- Julie Robison, Ph.D., Professor of Medicine, Center on Aging at the University of Connecticut School of Medicine
- Jennifer Switalski, Field Representative, Bureau of Aging, Connecticut Aging and Disability Services
- Michelle Erdmann, Program Manager, Brown County Aging & Disability Resource Center, Green Bay, Wisconsin
- Teri Bradford, Caregiver Specialist, Brown County Aging & Disability Resource Center, Green Bay, Wisconsin

Jonathan Westin, ACL Aging Services Program Specialist, provided background information on the NCSC initiative's goal to provide greater recognition, support, and inclusion of the family, kin, and tribal caregivers served by the Older Americans Act (OAA) National Family Caregiver Support Program (NFCSP) and the Native American Caregiver Support Program (NACSP), and to ensure these programs are well-positioned to respond to, and evolve with, a rapidly shifting policy and service delivery landscape.

### Overview of Caregiver Assessments

Kathy Kelly, Executive Director of FCA, provided an overview of caregiver assessments, which are an important part of understanding the caregiver's unique circumstances, strengths and challenges, health and well-being, and support needs. Caregiver assessments are a defined process of gathering information about

the caregiver and the care recipient and includes the caregiver's defined needs, barriers to carrying out caregiving responsibilities, and what existing supports a family caregiver can use. Programs conduct caregiver assessments through a home visit, online assessment, or a self-administered online assessment and inform what types of family caregiver support services a caregiver needs. Caregiver support service interventions include programs and trainings aimed at decreasing caregiver stress, loneliness, and depression, and increasing caregiving and communication skills competencies. It is important to assess caregivers' unique needs because each family is shaped by a range of factors, including environmental context, caregiving characteristics, the person receiving care, and the carer. Caregivers have three domains of needs: direct care, care planning, and caregiver wellness. Kelly noted that the design and implementation of caregiver assessments should consider the [cross-cutting principles](#) aligned with the [2022 National Strategy to Support Family Caregivers](#):

- Person- and family- centered approaches
- Addressing the impact of trauma on families and family systems
- Advancing diversity, equity, and inclusion for family caregivers in underserved communities
- Elevating direct care workforce as family caregiving partners

## Best Practices in Caregiver Assessments: Panel Discussion

For examples of individual assessments, please see the hyperlinked resources in the text to the left.

The NCSC TACC team moderated a panel discussion with Julie Robison, Ph.D., Jennifer Switalski, Michelle Erdmann, and Teri Bradford, who shared their experiences using caregiver assessments.

- **Assessment tools.** Erdmann indicated that Wisconsin uses the [Wisconsin Family Caregiver Needs Assessment](#), which includes a pre- and post- survey used to track changes over time in key areas measured. Switalski described the [Caregiver Assessment](#) Connecticut uses for their OAA funded programs and the Connecticut Statewide Respite Care Program. She provided an overview of the key domains and questions the assessment includes (e.g., depression screening, living environment, caregiver cognition, and behavioral needs questions). She also explained their use of a data collection system to help capture and streamline assessment data. Robison elaborated on current and forthcoming uses of caregiver assessments in Connecticut programs outside of OAA funded programs, such as the Medicaid Home and Community-Based Service programs and the Money Follows the Person Program.
- **Assessment approach.** Erdmann noted that Wisconsin uses their assessment tool to determine short-term needs that can be delivered immediately. She highlighted the importance of letting the caregivers tell their story and building a rapport. Switalski shared that Connecticut uses similar assessment domains as Wisconsin and prefers to conduct the assessment in the caregiver's environment – with the care recipient –

### Actionable Tools Shared

- **FCA's [Caregivers Count Too! Toolkit](#):** general resource to support organizations or persons who might be new to assessing the needs of family caregivers
- **FCA's [Selected Caregiver Assessment Measures: a Resource Inventory for Practitioners](#):** offers a starting point for organizations looking to build a caregiver assessment using reliable and valid measures
- **FCA's [Top 17 Resources for Family Caregivers](#):** provides popular caregiver support resources for organizations seeking to improve capacity for supporting caregivers
- **Wisconsin's [Caregiver Support Aging Operations Manual](#):** outlines the program guidelines, policies, and procedures for local agencies implementing federal and state caregiver programs

*\* To link directly to the assessment tools used in Wisconsin and Connecticut and described during this webinar, please reference the hyperlinks within the text to the left.*

to best understand their needs. Robison emphasized the importance of capturing data in a way that lends itself to assessing changes over time.

- **Assessment funding.** The panelists spoke about their strategies for combining funding streams to support caregiver services, supports, and assessment, which include a combination of OAA Title III-E (NFCSP) funding, statewide initiatives, and grant funding. They also spoke about efficiencies in leveraging staff from across programs to implement assessments (i.e., ADRC specialists and state respite care managers).
- **Assessment frequency.** Bradford noted that Wisconsin conducts assessments during their first meeting with caregivers and follow up annually to determine changes in the caregiver's needs.
- **Advancing health equity.** Bradford shared that Wisconsin provides translators for caregivers who do not speak English. Switalski added that Connecticut provides translation services through the regional area agency on aging. Additionally, Connecticut updated the consumer registration form, which includes gender identity questions, and updated race and ethnicity question guidelines.
- **Assessment uses.** Bradford and Switalski explained that the information gathered from the assessment informs the care plan, which is flexible based on caregiver needs. Robison added that Connecticut also uses the assessment to help inform care managers regarding whether the family would benefit from enrollment in a program that supports persons with dementia.

## NCSC TACC Caregiver Assessments Environmental Scan

On behalf of the NCSC TACC, Salom Teshale, from the National Academy for State Health Policy (NASHP), shared that the team is conducting a 50-state scan of caregiver assessments used in NFCSP and a literature review of caregiver assessments and supports used in both NFCSP and NACSP. The scan's early findings indicate the importance of training and guidance for effective delivery. The team also found that states' processes to collect caregiver outcomes and assessment and follow-up data varies. Teshale noted that more information, including an analysis of the assessment results and best practices, will be available soon.