



Supporting Working Caregivers: A Self-Assessment Tool for Community Agencies

Introduction

A caregiver-friendly agency is helpful and responsive to working caregivers. It adopts policies and creates programs that recognize the caregiver as an important member of the care team with individual needs apart from those of the person receiving care. By meeting the needs of working caregivers, other types of caregivers benefit tremendously.

A caregiver-friendly agency strives to identify caregivers and understand their personal and work responsibilities, recognizes their contributions, and creates flexible, individualized supports that enhance their ability to give care while balancing self-care needs. These agencies work in partnership with and seek input from the primary non-paid caregiver, the older person, other non-paid caregivers, as well as other appropriate agencies within the human service system.

These agencies integrate the following principles into their efforts to serve caregivers:

- Flexibility – by responding to individual needs and preferences that change over time, and by providing services when and where they are needed.
- Choice – by providing suitable options of support services that caregivers can choose depending on their needs and preferences.
- Multi-disciplinary seamless system – by constructing a system of support that appears seamless to the caregiver although it is composed of various helping organizations.
- Validation – by recognizing and celebrating the contributions caregivers make.
- Empowerment – by providing the needed resources to help the caregiver make decisions and to participate fully in the care planning process.
- Self-care – by recognizing the right of caregivers to services for their sole benefit.
- Advocacy – by encouraging and supporting caregivers' participation in the design of beneficial health care services for their care recipient as well as to advocate for legislative policies and programs that address the needs of older adults and their caregivers.

This tool, *Supporting Working Caregivers: A Self-Assessment Tool for Community Agencies* is an instrument that community agencies can use to measure their progress in becoming caregiver-friendly. It offers a way to assess an agency's strength in addressing the needs of caregivers as well as identifying areas where improvements may be needed. It can help an agency make decisions about how to adapt policies, programs, and operations to better meet the needs of caregivers.

Using the Tool

Ask staff members and the caregivers you serve to complete the inventory. It is recommended that you gather the perspectives of at least three types of staff members (senior management, program planners, direct service provider staff), and caregivers who use your services. By examining these different perspectives you will be able to capture a realistic snapshot of how staff and clients view the agency's responsiveness to caregiver needs.

Although there is no absolute scale of "caregiver-friendliness," the overall agency score will indicate how well staff and caregivers think the agency is doing in various areas and where you can improve to become more responsive to the needs of caregivers. When you compare the scores of the three types of staff who complete the survey, you may find similarities and differences in perception based on job functions. Compare the staff scores with those of the caregivers. What are the implications of the differences perceived by caregivers and staff? What similarities are there in the scores of caregivers and staff? (See the scoring section below.)

Develop an action plan based on the agency's scores. It is recommended that you complete the survey annually to plot progress as you implement the agency's action plan for enhancing "caregiver-friendly" policies and programs. You can also use the results as a basis for staff training, strategic planning sessions, and consumer relations improvement workshops.

Scoring Surveys

A spreadsheet has been developed to simplify the scoring process for your surveys. Before you start, simply organize your surveys into groups – one for each type of respondent (senior managers, program planners, direct service provider staff, caregivers). Within each group, write a code number on each survey so you can keep track of which ones have been entered into the scoring sheet. For example, you can code senior managers as SM1, SM2, SM3, etc. For planning staff, use PS1, PS2, PS3, etc. For direct service provider staff, use DSS1, DSS2, DSS3, etc., and for caregivers, use CG1, CG2, CG3, etc.

Next, open the Excel Workbook file called "caregiver scoring.xls" and notice that there are five worksheets in this file. Look near the bottom of the screen where you will see five tabs with the first one labeled "grand summary." You do not need to enter any data in this worksheet; it will automatically summarize the data you enter in other sections of the file. The other four worksheets are set up for you to enter the individual survey data for each group participant. You will find that several "cells" of the spreadsheet have been protected so that you cannot delete important formulas. Even though we have taken many precautions to make this error-proof, it would be a good idea to make a copy of the file. Save the document using another name and be sure to remember its name and location on your system.

For each group, you will work with one survey at a time and enter all the data for that survey. So, if you are entering the senior manager surveys, go to the worksheet labeled "sr mgmt" by clicking on that tab in the lower left corner of your screen. Begin entering the survey data on row 3 where you see the id "SM#1." Enter the answers to questions one through eight (from the survey's Section A: Building Quality Relationships with Caregivers) by typing the response code number (1, 2, 3, 4, or 5) in the column for that question. You will see on the survey that a "5" means that a respondent answered "always" while a "4" means s/he answered "usually" and a "3" means "sometimes" and a "2" means "rarely" while a "1" means "never." If the person checked the "don't know" box or if s/he skipped that question, simply leave the corresponding spreadsheet cell blank.

After you finish entering the responses to the questions in Section A, move down to Row 12 and enter the responses to the questions in Section B. Continue in this manner until you have entered all the responses from that survey.

The spreadsheet is set up to give you enough rows to enter survey responses for 4 senior managers, 6 planning staff respondents, 10 direct service providers, and 12 caregivers. If you need to enter information for additional respondents, simply add more lines by clicking on the row that says, “insert additional rows here if needed,” then go to the top of the screen and click on the “Insert” menu and then click on “Rows.” This will automatically insert a new row above the one you’re in, and it will update the calculations to correctly summarize the data.

As you enter your data, you will see that summary information is being created for each question. This summary statistic provides the group average for each question. In addition, a section average is created that summarizes the responses for all questions in the section. The section average is displayed on the group sheet as well as on the grand summary sheet.

The scoring process sounds confusing, but it is actually much easier to do it than to describe it! It does not take a great deal of time to enter the data, and it will provide you with all the summary statistics you need. When you look at the grand summary sheet, you will see that the average responses are provided for each section of the survey, by group. You will be able to see if groups have different perceptions about the aspects of your program described in each section. If you are interested in how the groups compare on an individual question, you simply view the summary statistics for that question on each of the four worksheets, and manually compare them.

PLEASE NOTE: The Caregiver Assessment Tool and electronic Scoring Tool are available on the n4a Web site (www.n4a.org).

A. Building Quality Relationships with Caregivers

This statement is true of this agency:	Always (5)	Usually (4)	Sometimes (3)	Rarely (2)	Never (1)	Don't Know/ Does Not Apply
1. The agency's commitment to serving caregivers is evident in its mission statement and strategic plan.	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/>
2. Agency staff participates in customer service training.	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/>
3. The caregiver's perspective is actively solicited to ensure that services and resources are responsive to all different types of caregivers (working, long distance, spouses, adult children, elderly, etc.).	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/>
4. The agency welcomes caregiver involvement with service design in many different ways, i.e., focus groups and satisfaction surveys.	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/>
5. The agency offers caregiver educational meetings, workshops and programs in response to their needs.	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/>
6. The agency encourages all caregivers to participate in agency activities.	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/>
7. Caregivers are included in selecting appropriate supports for elders by participating in care planning and follow up.	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/>
8. The agency is involved in coalitions of providers and community partners to address caregiver issues.	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/>

B. Respect and Culture

This statement is true of this agency:	Always (5)	Usually (4)	Sometimes (3)	Rarely (2)	Never (1)	Don't Know/ Does Not Apply
1. The agency asks caregivers about their values and beliefs about caregiving and adapts policies and practices accordingly.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
2. The agency asks caregivers and older adults how they would like to be addressed, i.e., "Mr." or "Mrs."	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
3. The contributions caregivers make are validated by the agency.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
4. The caregiver is viewed as a client as evidenced by products and services designed specifically for caregivers.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
5. The agency supports all types of caregiving situations (for example, spouses, adult children, domestic partners, religious volunteers, neighbors and friends).	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
6. When appropriate, the agency identifies and works with the entire family/non-family caregiving support system as a unit.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
7. The agency respects the confidentiality of caregivers and elders.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
8. The agency uses multi-cultural curriculum, activities, and materials when working with elders and caregivers.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
9. The agency partners with leaders from communities of color to reach diverse populations.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
10. The agency recruits diverse staff and caregivers to participate in agency activities.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
11. The agency treats caregivers with respect.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
12. The agency is able to communicate with caregivers in their own language.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
13. The agency prepares written materials in the major languages of caregivers in the community.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>

C. Family Communication

This statement is true of this agency:	Always (5)	Usually (4)	Sometimes (3)	Rarely (2)	Never (1)	Don't Know/ Does Not Apply
1. There is a central number that caregivers can use to access all services.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
2. The answering machine or voice mail is courteous and responded to promptly.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
3. The answering machine or voice mail explains how to reach staff responsible for caregiving issues.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
4. All callers to the agency are informed about services available for caregivers.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
5. The initial intake paperwork for the agency is easy to understand.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
6. The agency provides new caregivers with an orientation to their programs and responses to all questions asked.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
7. The agency provides both scheduled and on-demand caregiver conferences at times convenient to caregivers.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
8. The agency offers meetings (both in-person or via conference call) that involve all support persons, including long distance caregivers, in decision making and planning.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
9. The agency has private space available to conduct caregiver meetings.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
10. The agency has conflict resolution policies that are used to resolve issues with caregivers.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
11. The agency provides caregivers with the information and tools they need to make informed decisions.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
12. The agency promotes its services throughout the community and to local businesses.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
13. The agency provides caregiver education in multiple ways (e.g., group settings, one-on-one, through written materials, etc.).	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
14. The agency uses electronic tools such as its web site and e-mail to communicate with caregivers.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>

D. Anticipating Caregiver Needs

This statement is true of this agency:	Always (5)	Usually (4)	Sometimes (3)	Rarely (2)	Never (1)	Don't Know/ Does Not Apply
1. Caregivers are identified for all elder clients, as appropriate.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
2. An assessment of the caregiver's needs is conducted by the agency.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
3. The agency continually provides caregivers with written materials that address their changing concerns.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
4. The agency attempts to accommodate unusual requests from caregivers.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
5. Staff takes the time to help caregivers understand how the agency's activities contribute to their well being.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
6. The agency uses the care planning process and other opportunities to help caregivers plan for the future.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
7. The agency informs caregivers of the breadth of services available through the agency and other community organizations.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
8. The agency teaches caregivers how to access resources available in the community.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
9. Caregivers are informed of helpful events offered in the community.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
10. The agency asks caregivers questions about their job(s) to take into account the caregiver's work demands when offering services.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
11. In response to caregivers differing work needs, the agency offers services during off hours.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
12. The agency accommodates most requests from caregivers as their needs change over time.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
13. When caregivers are placed on waiting lists for services, the agency offers other resources while they wait.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
14. The agency conducts periodic evaluations with caregivers.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
15. Working caregivers are encouraged to ask their employers about the Family Medical and Leave Act (FMLA), flexible work arrangements, and other employee benefits.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>
16. Caregivers are referred to appropriate resources after the older adult moves to a nursing home or passes away.	<input type="checkbox"/> ₅	<input type="checkbox"/> ₄	<input type="checkbox"/> ₃	<input type="checkbox"/> ₂	<input type="checkbox"/> ₁	<input type="checkbox"/>

E. Caregiver Friendly Program Elements

The agency incorporates the following caregiver-friendly elements into programming:	Yes 5	No 1
1. Weekend services	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
2. Off-hours services	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
3. Extended hours in either early morning or late evening	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
4. Client-directed services	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
5. Family and friends as service providers	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
6. Caregiver assessments	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
7. In-home caregiver assessments	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
8. Social activities for caregivers	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
9. Response to episodic demands	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
10. Response to emergencies	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
11. Caregiver advocacy opportunities	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
12. Caregiver support or rejuvenation activities	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
13. Facilitation of family meetings	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
14. Collaboration with other community resources to meet the needs of caregivers	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁
15. On-going training and educational opportunities for caregivers	<input type="checkbox"/> ₅	<input type="checkbox"/> ₁

ADDITIONAL COMMENTS & RECOMMENDATIONS

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