Elements of a Caregiver Presentation Script

Slide 1 – Elements of a Family Caregiver

Introduce presenters and collaborators. Define presentation objectives.

Presentation objectives: The Elements of a Family Caregiver presentation is for community providers who do not formally service individuals who are family caregivers. The presentation means to review the foundational and basic elements or characteristics that encompass the caregiving experience. By the end of the presentation, attendees will be able to identify family caregivers in the community.

Slide 2 – Housekeeping

Review virtual presentation basics:

- Chat used for introductions, comments, and/or questions, hand Raise function.
- Telephone mute and un-mute procedure and a reminder to mute after speaking.

Slide 3 – Today's Agenda

Review the day's agenda.

Slide 4 – Poll #1

Before the presentation, determine how to complete a poll. Consider poll features available in Zoom or other video conference software.

Read poll questions. Do not review correct answers until the second poll to capture changes from the beginning to the end of the presentation/workshop.

- Questions:
    1. How many family caregivers do you know?
        i. 0-2
        ii. 3-5
        iii. 6-8
        iv. 9+
    2. Can you identify family caregivers in your organization?
        i. Yes
        ii. No
    3. From a scale of 1 to 5, how comfortable are you discussing resources for family caregivers?
        i. 1 = Least Comfortable
        ii. 2 = Slightly Comfortable
        iii. 3 = Neutral
        iv. 4 = Moderately Comfortable
        v. 5 = Most Comfortable
    4. Are you a family caregiver?
        i. Yes
        ii. No
        iii. Unsure

Slide 5 – Family

Define family in terms of "family caregiving."

Points to discuss: Family caregivers are individuals who support another person with daily or reoccurring tasks. Family is a blood relative, friend, and chosen family. Often, the support is perceived as an extension of the initial role (e.g., parent, adult child, or grandparent).

- **Role**

  Compare traditional or recognized bonds with supportive relationships arising from changes in health conditions. Consider a parent and their young child contrasted with a neighbor and older adult who develops Parkinson's disease. Discuss role changes in various life and health stages.

- **Age**

  Discuss that service providers identify family caregivers based on criteria developed by funding sources. Emphasize that there is room for nuance in family caregiving. For instance, service providers typically work with individuals who are, at least, 18 years old. However, relatives, chosen family or friends may care for others at a younger age. Discuss that caregiving responsibilities may start at any age or stage of development depending on the health conditions that arise.

- **Health Conditions**

  Discuss how changes in an individual's health condition impacts their independence (i.e., cognitively, physically, and emotionally). Mention that health changes may occur abruptly and/or gradually. Lastly, connect these changes and potential loss of independence to the need for a caregiver who may be a family member.

Slide 6 – Caregiving

Define caregiving as assistance or support an individual provides to another. Mentioned that a caregiver may support multiple individuals. Note the various terms used to describe or label family caregivers including: care partner, unpaid caregivers, and informal caregivers.

Ask participants to share other terms used by service providers or within their family structure to describe family caregivers. Note that service providers may use various terms to describe caregiving. Note that to identify community resources, family caregivers may have to describe their responsibilities and their relationship with the person who needs support.

- **Responsibilities**

  Emphasize that the responsibilities that caregiving encompass, must be shaped by the health needs and individual boundaries of the person who experiences health changes. Note that

caregiving responsibilities require flexibility in expectations, schedules, and in many areas of an individual's. Acknowledge that family caregivers' income and their own health are disrupted due to caregiving responsibilities.

- **Compensation**

  Mention that caregiving responsibilities are usually unpaid. Acknowledge that and discuss how a person's cultural background and family system will influence their perception of financial compensation for caregiving. For example, caregiving responsibilities are accepted as part of a relational bond with the person who needs support and suggesting financial compensation can be offensive.

- **Health Status and Mental Health & Social Impact**

  Recognize that caregiving responsibilities may affect the caregiver's health. Discuss that caregivers report having less or no time to spend on themselves due to their caregiving

Slide 7 – Questions

Determine what mode of engagement will serve the presentation best (e.g., typing responses in chat or vocalizing responses by unmuting).

Block 5-10 minutes for questions before transitioning to the case review portion of the presentation.

Slide 8 – Who is a Caregiver?

Instructions: Participants will review cases together and discuss unique elements for each individual.

Request volunteers to read each case. After the reading of each case, review and identify characteristics describing family caregiving. Suggested questions:

1. *What is [insert name here] role?*
   a. *How are these individuals connected? What is their relationship or bond?*
2. *What caretaking or caregiving responsibilities does [insert name here] have?*
   a. *Does the health condition discussed impact the responsibilities?*
   b. *Are these responsibilities ongoing or short-term?*
3. *What are some stressors that the family caregivers have experienced?*
   a. *Slide 9 not a family caregiver – Judith*
   b. *Slide 10 not a family caregiver – Alex*
   c. *Slide 11 family caregiver – Benjamin*
   d. *Slide 12 family caregiver – Omari and Omari's cousin*
   e. *Slide 13 family caregiver – Barbara*
   f. *Slide 14 family caregiver – Richard*
   g. *Slide 15 not a family caregiver – Sara*
   h. *Slide 16 not a family caregiver – Winnie*

Suggested unique elements (characteristics) to discuss:

i. *Under what circumstances would a colleague become a family caregiver?*
    i. *If colleague provided ongoing support transportation and medication support for her work friend's sister.*
    ii. *How can colleagues or work friend, support another's caregiving journey*
        1. *Recommended responses: Share Paid Family Leave information, government funded programs (California – In-Home Supportive Services), specialized services such as a resource center*
j. *Can individuals living in a different state be a family caregiver?*
    i. *Yes, these caregivers are considered long-distance caregivers. They can be the primary or secondary caregiver. A secondary caregiver is a caregiver who supports another caregiver who is responsible for most caregiving responsibilities. Secondary caregivers and long-distance caregivers can be a backup during emergency or planned absences by the primary caregiver. They can also support with administrative tasks such as bills while the primary caregiver provides hands-on support.*
k. *Can a person who is an IHSS provider (receiving income for support) also be a family caregiver?*
    i. *Yes, during the application process, a relative or friend who provides caregiving support, can be assigned as the IHSS provider for a care receiver. IHSS can support a family caregiver*
l. *Can someone be the family caregiver for two individuals?*
    i. *Yes, sometimes family caregivers support multiple individuals. For instance, an older sibling can support their young adult sibling who experienced a car accident while they support their aging parents.*
m. *Can a care recipient have an IHSS provider and a family caregiver?*
    i. *Yes, depending on the care recipient's needs, they may need assistance from various individuals.*

Slide 9 – Meet Judith

- **<u>Meet Judith</u>**: *If the breakout room option is selected, presenters must share each case with each breakout room. Suggestion: Join the breakout room and copy/paste the following text into the chat. If together, navigate to each slide as each case as reviewed/discussed.*

    - Judith (33) works full-time as a Parent and Family Advocate.

    - On Wednesday, Judith's friend and coworker, Ji (40), shared that they cannot concentrate because they are exhausted. Ji explained that their sister is keeping everyone up at night.

    - Friday at lunch, Ji receives a call to confirm two medical appointments on Monday for their sister.

    - Ji apologizes for the interruption and tells Judith that they are worried because their sick hours are low and there are several appointments coming up for their sister because of the cancer treatment. Judith asks how she can support Ji.

<u>Additional points to discuss</u>: How may Judith support her colleague Ji? Informing Ji about Paid Family Leave.

Slide 10 – Meet Alex

- **Meet Alex**: *If breakout room option is selected, presenters must share each case with each breakout room. Suggestion: Join the breakout room and copy/paste the following text into the chat. If together, navigate to each slide as each case as reviewed/discussed.*

  - Alex (23) lives in San Diego and visited their college roommate, Amayra (23), in D.C. over a long-weekend. They visit often throughout the year.
  - Alex noticed that Amayra had lower-stomach discomfort. Amayra shared that she is also having issues urinating.
  - Amayra explained that after giving birth, she gets UTIs often and she has not had time to schedule a doctor's appointment.
  - Alex helped Amayra make an appointment. Two weeks later, Amayra calls Alex to catch-up and thanks them for helping her make the call, stating, "What would I do without you!"

Additional points to discuss: Though Alex is not, a friend can be a family caregiver. If Amayra's situation were to worsen and Alex provided ongoing support from a distance, would she be a family caregiver? Does their age bare any relevance to someone being a family caregiver?

Slide 11 – Meet Benjamin

- **Meet Benjamin**: *If breakout room option is selected, presenters must share each case with each breakout room. Suggestion: Join the breakout room and copy/paste the following text into the chat. If together, navigate to each slide as each case as reviewed/discussed.*

  - Benjamin and Maya (she/her) are domestic partners. Benjamin is 60 years old and Maya is 59.
  - They are working on increasing their income to afford a studio apartment. They have been living in a motel for two months.
  - Maya has Chronic Obstructive Pulmonary Disease (COPD) and consistently misses her medications.
  - Benjamin helps Maya schedule medical appointments, administer medication, and drives her to all her appointments.
  - Maya is eligible to receive IHSS and Benjamin will be the service provider.

Additional, points to discuss: Benjamin will be the IHSS provider, is he still a family caregiver when financially compensated for the caregiving duties?

Slide 12 – Meet Omari

- **Meet Omari**: *If breakout room option is selected, presenters must share each case with each breakout room. Suggestion: Join the breakout room and copy/paste the following text into the chat. If together, navigate to each slide as each case as reviewed/discussed.*

  - After his great aunt's (64) hip fracture, Omari (46) moved in for six months. Omari used intermittent PFL during this time to support with appointments and treatment. He returned to his home nearby recently.

  - After moving back home, Omari hired a contractor to update his aunt's home because he is worried about safety.

  - Omari's cousin visits their aunt daily to ensure she is eating, taking medications, and support with other needs.

  - Omari's father (64) has Alzheimer's and diabetes. Both conditions are stable. He lives in a Memory Care Assisted Living, which Omari visits often.

Points to discuss further if the group has not: Individuals, such as Omari, may be family caregivers and live separate from the care receiver. Caregiving responsibilities can be distributed between multiple individuals. If the care receiver lives in a Board & Care or Assisted Living, family caregivers may continue providing emotional support, socialization, and even direct care.

Slide 13 – Meet Barbara

- **Meet Barbara**: *If breakout room option is selected, presenters must share each case with each breakout room. Suggestion: Join the breakout room and copy/paste the following text into the chat. If together, navigate to each slide as each case as reviewed/discussed.*

  - Barbara (50) has moved in with her mother (89) and brother (55). Barbara is a full-time Human Resources Manager.

  - Barbara's mother, Mary, has severe memory loss and other chronic health conditions. Mary requires supervision 24/7 and assistance with all ADLs/IALDs.

  - Barbara's brother, Jose, has intellectual and physical disabilities. Jose has needed support with ADLs/IADLs since he was a child.

  - Barbara is seeking support by hiring another IHSS provider to cover the hours both Mary and Jose receive.

  - When Barbara gets off of work, she relieves the current IHSS provider. Barbara coordinates medical appointments, does household chores, and assists with ADLs/IADLs.

Points to discuss further if the group has not: Define IHSS (In-Home Supportive Services) and ADLs/IADLs (Activities of Daily Living/Instrumental Activities of Daily Living).

In-Home Supportive Services is a program through the Department of Social Services available to older adults (65+) or individuals with disabilities. Link to IHSS information page: https://dpss.lacounty.gov/en/senior-and-disabled/ihss/recipients.html.

ADLs are tasks that take care of one's own body (hygiene, dressing, use of personal devices, and mobility). IADLs are tasks that support daily life and involve others (health management, home chores, shopping, and financial responsibilities).

Slide 14 – Meet Richard

- **Meet Richard**: *If breakout room option is selected, presenters must share each case with each breakout room. Suggestion: Join the breakout room and copy/paste the following text into the chat. If together, navigate to each slide as each case as reviewed/discussed.*

  - Richard (45) lives with his husband (47) and mother (82) in Los Angeles County. Jose works at home as a stay-at-home parent to their two children.
  - Richard's mother, Maura, drives herself to appointments, advocates for herself with medical and service providers, and says she is independent in her day-to-day tasks.
  - Richard shares that he picks up medication orders and organizes pills daily. Richard and his husband cover all financial expenses. When Maura has sensitive documents to complete, she requests Richard's help because she is scared to make a mistake.
  - Richard attempts to coordinate with his siblings to visit their mother but expresses that he is frustrated with his siblings because they do not care for her well.

Points to discuss further if the group has not: Discuss how family caregiving can be on a spectrum. This spectrum may involve providing more "hands-off" or less intrusive support to care recipients and go up to providing direct one-on-one physical support to another person. Care recipients, like Maura, may be independent in many or most daily tasks but may receive financial support or assistance with administrative tasks from another person. This is also family caregiving.

Slide 15 – Meet Sara

- **Meet Richard**: *If breakout room option is selected, presenters must share each case with each breakout room. Suggestion: Join the breakout room and copy/paste the following text into the chat. If together, navigate to each slide as each case as reviewed/discussed.*

  - Sara (67) visits her neighbor Joseph (70) daily at lunchtime. Sara and Joseph started to do this started to do this during Covid lockdown to keep each other company while staying in a social bubble to limit exposure to the virus.
  - Sara brings different desserts and helps Joseph warm up his home-delivered meals during their visits. Joseph shares gardening tips, herbs, and dried fruit with Sara.
  - In 2022, Joseph had knee surgery and Sara drove Joseph to and from the procedure. Joseph remained at home, received physical therapy at home, and when he able to, drove to aquatic therapy.

- Joseph encourages Sara to visit their local pool to join aquatic exercises. Sara asked Joseph to go with her to sign-up.

<u>Points to discuss further if the group has not</u>: Neighbors can develop a friendship which involves emotional support and socialization opportunities. Neighbors with shared interests can build a bond.

Slide 16 – Meet Winnie

- **<u>Meet Winnie</u>**: *If breakout room option is selected, presenters must share each case with each breakout room. Suggestion: Join the breakout room and copy/paste the following text into the chat. If together, navigate to each slide as each case as reviewed/discussed.*

  - Winnie (20) is a college senior at UC Berkeley. Winnie visits her nana (71) in San Francisco once a month. Winnie checks in throughout the month via text or call.

  - Last month, Winnie's nana shared that she feels fatigued and is experiencing shortness of breath. Winnie scheduled a doctor's appointment for her nana and coordinated transportation for her.

  - Winnie received a card from her nana with a $50 bill. Winnie called her nana, thanked her for the card, and reminded nana that she does not need to "pay" Winnie because she is happy to help.

<u>Points to discuss further if the group has not</u>: Regular family visits may involve family caregiving tasks however, Winnie stepped in for this one-time need only. A family member, like Winnie, may visit their grandparent or other relative for socializing without having caregiving responsibilities.

Slide 17 – Questions

Conclude the exercise by asking for any questions or comments, and thanking everyone for their participation.

Slide 18 – USC Family Caregiver Support Center Services

Identify local agencies and update slide to reflect geographically appropriate programs for the target audience. For state resources, search Area Agency on Aging using an internet browser or visit www.eldercare.acl.gov, enter your zip code or city/state, to identify resources for older adults, adults with disabilities, and their family caregivers.

A recommended resource in California: In California, the Caregiver Resource Center system is available and specializes in family caregiving. In Los Angeles, the USC Family Caregiver Support Center/LACRC can support caregivers in identifying additional local resources. Services include connection to a family consultant who provides linkages to resources, emotional support and consultation services throughout the caregiver's caregiving journey. Family Consultants also facilitate evidence-based workshops and support groups that cater to caregiving needs including different caregiving topics regarding stress management and family dynamics.

Slide 19 – Poll #2

Before presentation, determine how to complete poll. Consider poll features available in Zoom or other video conference software.

Read poll questions. Review correct answers and note any differences in responses. If applicable, note if/when there is an increase in questions 1, 2, and 7. An increase in these questions may suggest an improved understanding of family caregiving.

- Questions:
    1. How many family caregivers do you know?
        i. 0-2
        ii. 3-5
        iii. 6-8
        iv. 9+
    2. Can you identify family caregivers in your organization?
        i. Yes
        ii. No
    3. From a scale of 1 to 5, how comfortable are you discussing resources for family caregivers?
        i. 1 = Least Comfortable
        ii. 2 = Slightly Comfortable
        iii. 3 = Neutral
        iv. 4 = Moderately Comfortable
        v. 5 = Most Comfortable
    4. Are you a family caregiver?
        i. Yes
        ii. No
        iii. Unsure

Slide 20 – Evaluation

Conclude the presentation five minutes before the scheduled time to allow for participants to complete an evaluation. Suggested evaluation below.

2-minute Evaluation: https://forms.gle/vZgew3MHPpeBo59c9

USC Family Caregiver Support Center: https://losangelescrc.usc.edu/

Find your local Caregiver Resource Center: https://www.caregivercalifornia.org/find-your-local-center/

Slide 30 – Thank you

Modify slide to reflect contact information for presenting agency.

Slide # – Slide title

Script text

Script text

1. **Sub-category title**

   Script text

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Slide # – Slide title

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