

# CAREGIVER SUPPORT PLAN

## MAKING IT PERSONAL



Family Caregivers  
of British Columbia

— Let us help —








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# The Benefits of a Support Plan

Creating a personal caregiving plan is driven by your needs and is tailored to what will give you the greatest support to reduce emotional and physical stress. It can be a valuable exercise to support you in your caregiver role and is beneficial,<sup>1,2</sup> by:

-  **Being engaged and informed:** actively planning and managing needs helps support desired outcomes and solutions.
-  **Having clarity and taking action:** knowing your needs and what supports you have available improves the chance of successfully moving towards action.
-  **Balancing time:** creating a support plan for yourself allows space and opportunities to balance your time between caregiving responsibilities and taking care of yourself and your own needs.
-  **Having flexibility:** your caregiving role and circumstances may not change but having flexibility and choice with services and supports can empower you and may reduce feelings of burden.
-  **Allowing better communication:** having a caregiver support plan enables you to clarify with other people what you are trying to do and also what you would like them to do in order to support you.

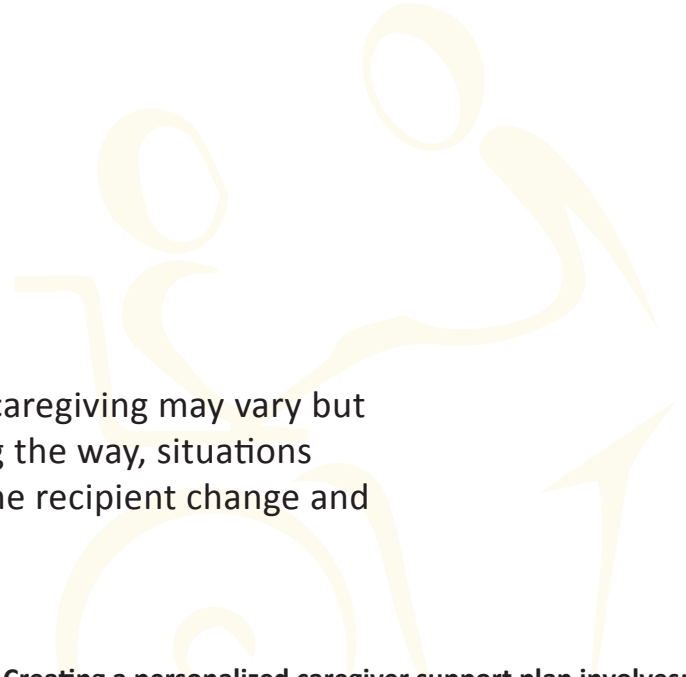


“It’s never overreacting to ask for what you want and need.”  
— Amy Poehler

## Introduction

### Caregiving is caregiving.

Frequency, intensity, duration and types of caregiving may vary but all caregivers are on a continuum. And along the way, situations change, transitions happen, care needs of the recipient change and caregiving needs change.



While uncertainty is a certainty with caregiving, a caregiving support plan can give you a foundation and strategies to help you navigate the ups and downs and twists and turns. It allows you to think about how best to care and what supports will help. It also allows you to better manage what’s in your control and what’s not.

#### Creating a personalized caregiver support plan involves:

- ♥ understanding your support needs;
- ♥ taking stock of the here and now with overall caregiving well-being;
- ♥ prioritizing your needs and deciding where you want to be and then making a plan to get there;
- ♥ thinking about a contingency plan – a “what if the bottom falls out and I can’t care anymore.”

<sup>1</sup>Vidyalakshmi Sundar, Susan W. Fox & Kimberly G. Phillips (2014) Transitions in Caregiving: Evaluating a Person-Centered Approach to Supporting Family Caregivers in the Community, Journal of Gerontological Social Work, 57:6-7, 750-765, DOI: 10.1080/01634372.2013.847885

<sup>2</sup>Why should I create a caregiver action plan? <https://elizz.com/planning/why-should-i-create-a-caregiver-action-plan/>

# Putting Together Your Caregiver Support Plan

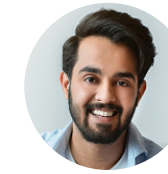
Without it seeming disrespectful or uncaring, caregiving can be seen as a “project.” All well executed projects have a plan. And all projects require support. Knowing what your needs are as a caregiver and strategies for supporting those needs are the foundation of your plan.

## The Many Faces of Caregiver Needs



Lin

is caring for her spouse who has significant memory loss but no other major health problems until a serious fall landed him in hospital.



Jaz

is caring for his mom with a long history of undiagnosed mental health challenges, back pain and diabetes. She’s being discharged from the hospital with one page of instructions and new prescriptions.



Harleen

is a student who is caring for her sister with kidney disease and is just learning to navigate dialysis and the care routines at home.



Angela

is caring for her spouse with terminal cancer and is struggling with the emotional drain that accompanies caring for a dying family member.

### STEP 01



## Identify Your Needs

Check in with yourself regularly with this worksheet [Understanding Your Caregiver Needs](#). It can help identify areas where more support can help, where you are experiencing difficulty or to fill a gap in your caregiving strategies. **For Lin, her needs include having time for herself during the day and an opportunity to take part in a support group.**

### STEP 03

## Find Your Motivation



Write down why these needs are important to you. How will it help you with your overall well-being and as a caregiver? **For Harleen, her need is to understand how dialysis works so she can support her sister in being as independent as possible.** Her motivation is: 1) she wants to support her sister to feel empowered in decision-making and in managing her disease and 2) knowing what is expected of her in a caregiving role will allow Harleen to manage her school schedule so she can still graduate.

### STEP 05

## Prepare for Setbacks

They happen. Think about how or who can help you with your needs. Or think about what might get in the way of filling your needs. How might you get around these things? If possible, create a plan to deal with possible setbacks. **For Jaz, a possible setback would be his mom not wanting anyone else helping with medications.** His plan is to use the case manager, whom his mom really enjoys, to support this conversation with his mom.

## Caregiver S.M.A.R.T goals<sup>3</sup>

Using the S.M.A.R.T<sup>4</sup> model is a helpful tool for setting and prioritizing goals. As an acronym, it stands for Specific, Measurable, Achievable (or Attainable), Relevant, and Time Related.

- Specific**
  - Is the goal concrete and measurable?
- Measurable**
  - How will you measure progress?
  - Can you break down the goal into smaller steps or smaller goals?
- Achievable**
  - Is your goal realistic given your situation?
  - Do you feel you have the knowledge, skills, and ability to achieve your goal?
- Relevant**
  - Is the goal relevant to your caregiving situation?
  - Does the goal align with your priorities?
- Time Related**
  - Does your goal have a specific timeline or end date?
  - Is the timeframe realistic for you? (If not, consider breaking it down into smaller steps or goals)

**An example of a S.M.A.R.T goal is:** I will call my friend Susan at 1:00 pm on Tuesdays for support for 3 months. My emotional well-being is important to me. This goal will give me the extra emotional support I need from someone I trust and value.

### When developing your goals, think about:

- WHO** is part of your support team in achieving this goal?
- WHAT** will achieving this goal help in your caregiving situation?
- WHICH** part of your caregiving situation is most important to change?
- WHEN** do you want to accomplish your goal?
- WHY** do you want to achieve this goal?
- HOW** will you tell when progress happens, or when you meet your goal?

### STEP 02



## Reflect On Your Current Caregiving Activities

Identify which of your current activities require your presence and which ones can be delegated. Ask yourself, are there activities that someone else can do? This delegation allows you to share the care and decisions with others. It also helps to create boundaries and balance your limited time, while establishing a circle of care and support around you and your care recipient. **For Jaz, he needs to better understand medication management but realizes he doesn’t need to help administer it.** He wants to delegate this task to community health services.

### STEP 04

## Detail Your Plan and Find Support



Keep it simple by writing down your plan. Sometimes it can be easier to get started with the help of a friend or family member. You can use our tool [Caregiver Plan](#) or find your own template to use. For some, using SMART goals helps them get very specific in planning and finding support. Finding support can include finding and utilizing resources like friends, family, local organizations, self-management programs, your family doctor, etc. We suggest brainstorming a list of all the supports that you think would be helpful in meeting your needs and then choosing one or two supports that you think will be most impactful that can be prioritized at the top of your list. For Angela, her top needs were dealing with feelings of sadness and grief. She spoke to their case manager and to the local hospice organization and was able to find a counsellor that was a good fit for her needs.

### STEP 06



## Visualize Your Success

How will your well-being and caregiving be different with more of your needs met? What type of reward will you enjoy?

<sup>3</sup>Collaborative, patient-centered goals are key for home health and hospice. Thornberry Ltd. April 18, 2019. Web. Retrieved from <https://ndocsoftware.com/2019/04/collaborative-patient-centered-goals-key-home-health-hospice/>

<sup>4</sup>Adapted from Doran, G. (1981). There’s a SMART way to write management’s goals and objectives. AMA Forum, November. Retrieved from <https://community.mis.temple.edu/mis0855002fall2015/files/2015/10/S.M.A.R.T-Way-Management-Review.pdf>

# The Importance of Identifying Your Needs

Checking in with your overall well-being and how resilient you feel is just as important as checking in with your needs. The intention is that you use our tools together to help integrate the process of creating a plan for support.

For example, the more needs you have met, the more likely you will feel healthy and balanced. The more resilient you feel, the more sustainable caregiving feels. Understanding your needs can help create more space for your well-being, validate your role and feelings and give you a starting place in creating a caregiver plan.

**You can start with our other caregiver tools:**

- [Are You a Healthy Caregiver?](#)
- [How Resilient Are You Feeling as a Caregiver?](#)

First off – doing a check in or evaluating your caregiving needs is not a judgement on how well you provide care. It’s an opportunity to reflect about how being a caregiver affects you, and to make sure you understand what type of help and information is available to support you. At the end of the day, taking care of yourself not only ensures the maintenance of your own wellbeing but also your ability to continue to care for your loved one. Research shows there are common areas of caregiver needs including<sup>5, 6</sup>:

1. how to care in a way that maximizes independence and prevents complications;
2. ways to increase or augment abilities, such as knowledge, skills, coping strategies, problem-solving, etc.;
3. ways to provide temporary or permanent relief of direct caregiving activities such as respite, case management, help with personal care, etc.;
4. managing physical and emotional needs of caregiving to support well-being;
5. balancing limited time and ensuring time gets set aside for self-care.

Some caregivers hold many beliefs about their role that influence their decision to consider their own needs. A common belief is that asking for help or identifying a need is embarrassing or an indication the caregiver isn’t capable of caring for the person on their own. Some caregivers feel that self-sacrifice is necessary in their role. This can prevent them from considering ways to improve their own health and well-being by having a need met to reduce their burden<sup>7</sup>.

Being able to bring awareness to your situation is often the most important step. Being able to identify immediate issues at any given time can help you realize gaps in knowledge and skills, and other kinds of help that would be useful in your caregiving role and in your own wellness. Since caregiving is dynamic, expect your needs to change. Your needs today may not reflect the situation a few months or even a few weeks down the road.

# Contingency Planning

Having a contingency or back up plan in case you become ill and can’t provide care is another important tool for caregivers and families to have. Your back up plan will help to ensure the person you care for continues to receive support<sup>8</sup>.

**Who can step in if you or other family caregivers can’t provide care?** Start by looking at all the areas you currently are providing care and support. Expand your circle of care to include other family members, friends or neighbours who may be able to help. You may need to look at publicly funded services, private care or non-profit organizations in your community. Ask yourself if one person can handle the care or if it can be divided among different people.

**Up to date legal and financial documents.** Ensure your will, power of attorney and an advance care plan (including a representation agreement and advance care directive) are current. Does someone outside of yourself know where these documents are located?

**Understand financial resources.** Take into account the additional costs increased care will require (even if it is publicly funded). For example, costs such as private care or help with housework and grocery shopping. Research eligibility for financial tax credits or publicly funded services.

**Planning for an Emergency Visit.** In a medical emergency whereby, paramedics need to transport you or the person you are caring for from home to hospital, create a “Just in Case” Emergency file. This would include a copy of medical history, emergency contacts, current list of medications, health care representation agreements and advance care plan. You can also create a packing list of essential items the care recipient needs should they need to leave their home or require hospitalization. Leave it with the contingency care plan including where to find these items.

**Who can step in and care for you, if you become critically ill?** Are they able and willing to care for me? Will they also look after the person I’m caring for? And who can I call as a backup if my go-to person is unavailable?

**Document your care plan.** Make it very clear what needs to be done. Review your care plan with your back up team. The care plan might include:

- Contact information for key people on the care team and other important services being used.
- Information about the care recipients’ condition, (including their current baseline state of health) as well as medical history, allergies and medic alert information.
- A care schedule including regularly planned visits from health care workers and professionals.
- Include information on the care recipient’s lifestyle, likes and dislikes, routines, etc.
- Make a schedule of what is done and when and provide enough detail that someone else can take over.
- Current list of medications including dosage and scheduling. Ensure all your medications have refills available and/or discuss with the family doctor about phone renewal as part of your back up plan.
- Directions around bill payments including passwords for computers.
- Directions around what to do if the care recipient’s health changes as well as emergency care measures, i.e., no blood transfusion, DNR (do not resuscitate), next of kin, Power of Attorney or Health Care Directive information.

<sup>5</sup>Teixeira, M.J.C., Abreu, W., Costa, N. et al. Understanding family caregivers’ needs to support relatives with advanced progressive disease at home: an ethnographic study in rural Portugal. BMC Palliat Care 19, 73 (2020). <https://doi.org/10.1186/s12904-020-00583-4>

<sup>6</sup>Interior Health. Sustainable Care-giving: Maximizing Supports in Middle Phase Dementia Clinical Practice Recommendations. (2006). <https://www.interiorhealth.ca/sites/Partners/SeniorsCare/DementiaPathway/MiddleDementiaPhase/Documents/SustainableCaregivingMaximizingSupports.pdf>

<sup>7</sup>Chen, Ya-Mei & Hedrick, Susan & Young, Heather. (2009). A pilot evaluation of the Family Caregiver Support Program. Evaluation and program planning. 33. 113-9. 10.1016/j.evalprogplan.2009.08.002. DOI: 10.1016/j.evalprogplan.2009.08.002

<sup>8</sup>Canadian Hospice Palliative Care Association. Contingency Plans for Caregivers. July 2013. [https://ehospice.com/canada\\_english\\_posts/contingency-plans-for-caregivers/](https://ehospice.com/canada_english_posts/contingency-plans-for-caregivers/)

“In my own deepening understanding of myself I find my capacity to serve others is deepened as well. The better I am at self-care the more genuinely nurturing of others I am able to be.”

— Mary Anne Radmacher

## Reaching out to us for support

Here is what you can do right now and how we can help:

For [emotional support or questions](#) related to caregiving, call our toll-free BC Caregiver Support Line at 1-877-520-3267. We are available Mon-Fri, 8:30am to 4pm. We offer a non-judgmental space for you to share your experience and explore supports that may be helpful to you at this time. We can assist you with health care navigation, referral to community resources and accessing a wide range of caregiving-related information. If we feel you could benefit from more one to one support, and/or are moving through a complex situation we can also refer you to our [1:1 Caregiver Coaching—see if you qualify](#).

Visit the [Caregiver Learning Center](#). We recognize it can feel overwhelming and time-consuming to sift through websites and links. See our caregiver resources on topics such as, caregiver well-being, financial information, health care navigation and many more important topics. Our caregiver resources aim to: increase your knowledge and skills, build confidence in your caregiving skills, and prevent caregiver burnout.

To receive news and information to your inbox, [sign up](#) for your newsletter and Enews.

Want to learn more about how to be a caregiver? Listen to our prerecorded [webinars](#) and Facebook live sessions. These free educational events cover your high-priority questions. And listen to our informative and engaging podcast, [Caregivers Out Loud](#).

Join one of our [family caregiver support groups](#): We are also continually expanding our list of community caregiver support groups around BC - [Find one near you](#).



### Family Caregiving: Don't do it alone.

Visit your online Caregiver Resource Centre:  
[www.familycaregiversbc.ca](http://www.familycaregiversbc.ca)



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— Let us help —

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We are grateful for the contributions from the **Caregiver Diversity Initiative Working Group** members:

