

Peace of Mind: A Caregiver's Guide to Contingency Planning

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Family Caregivers
of British Columbia

— Let us help —



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Introduction

Caregiving can be unpredictable. Having a contingency plan ensures the person you are caring for receives continuous care, in the event you can't or aren't able to. This guide provides an overview of the key parts of contingency planning and practical steps you can take to prepare for emergencies. At the end of this guide we have provided a workbook for you to complete, discuss and share with your family members and other caregivers.



Unexpected events, such as caregiver illness, emergencies, or the need for a longer break, can disrupt caregiving routines. A structured contingency plan:

- Ensures a smooth transition of care.
- Reduces stress for caregivers and the person they are caring for.
- Provides clear guidance for those stepping in.
- Prevents disruptions in medical and personal care routines.

Organizing Your Contingency Plan

A contingency plan is a backup plan for emergencies or unexpected situations. In an emergency, the caregiver can quickly follow the steps outlined in the contingency plan to ensure the care recipient receives immediate care.

Below are the essential components that should be included as part of your contingency plan.

Identify Who Can Step in If You or Other Family Caregivers Can't Provide Care

Review and document all areas where you currently provide support and consider who else—family members, friends, neighbours, or professionals—can help. If needed, explore publicly funded services, private care providers, and non-profit organizations in your community. Determine if one person can manage all responsibilities or if tasks can be divided among multiple caregivers.

Ensure Your Legal and Financial Documents Are Up to Date

Keep key legal documents current, including wills, power of attorney, health care representation agreement and advance care directive. Ensure someone you trust knows where to find these documents and how to access them when necessary!

Understand Your Financial Resources

Consider the costs that increased care needs may require. This includes costs for publicly funded services along with private costs including housekeeping, yard maintenance and grocery delivery. Research eligibility for financial tax credits, government assistance programs, and caregiver benefits.

Prepare for an Emergency Visit

Create a “Just in Case” Emergency File that is stored in a visible and accessible place, such as on the fridge and includes:

- A copy of medical history.
- Emergency contacts.
- A current list of medications and dosages.
- Healthcare representation agreements and advance care plans.
- Preferences on emergency medical treatments (Do-Not-Resuscitate (DNR) Orders, blood transfusion preferences, next of kin, etc.).
- A packing list of essential items in case the care recipient needs to leave home for hospitalization or emergency care.

Document a Care Plan

A care plan explains how to take care of someone. It focuses on regular day-to-day care and support for the person, including their needs, preferences, and what kind of help they will get.

You might already have a care plan written by a health professional. If not, you can create your own using the Contingency Planning Workbook.



What Goes in a Care Plan?

Below are key components that should be included:

1. **Care Recipient Personal Information:** Document the care recipient's life history, personal preferences, daily routines, hobbies, and likes/dislikes. Include comforting rituals or activities that help them feel at ease.
2. **Medical Information:** Include condition details, medical history, allergies, and a current list of medications (including dosages and scheduling). Ensure all prescriptions are current and discuss renewal options with the family doctor.
3. **Care Team Members:** Add the list of family and friend caregivers, doctors, case managers, pharmacists and other care providers including roles and contact details.
4. **Emergency Care Instructions:** Ensure Advance Care Directives, Do-Not-Resuscitate (DNR) and next-of-kin contact details can be located easily.
5. **Care Provider Schedule:** Record regularly scheduled visits from healthcare professionals, home support providers, housekeeping, visitors, etc.
6. **Task Schedule:** Provide a structured list of daily/weekly caregiving tasks, including medication administration, personal care, and meal preparation (including food preferences). Make sure to add specific timing and instructions to help backup caregivers take over effectively.
7. **Bill Payments and Financial Management:** Include instructions for paying essential bills (rent, utilities, insurance, etc.), account details, payment methods, and online account login information.

Steps to Implement Your Contingency Plan



Step 1: Document Care Plan Information. Write out a care plan with the care recipient's key information, including medical conditions, daily routines, and critical contacts. If you don't already have a Care Plan in place, you can use the workbook in this guide to help you create one.



Step 2: Identify and Communicate with Backup Caregivers. Ensure that family members, friends and other trusted individuals understand their roles and responsibilities. Take the time to go over the plan with them, along with scenarios and actionable steps.



Step 3: Organize Legal and Financial Documents. Keep copies of health care directives, wills, power of attorney, insurance details, and financial information in a secure, accessible place.



Step 4: Prepare for Emergencies. Have a list of emergency contacts and supplies ready in case of unexpected situations.



Step 5: Regularly Review and Update the Contingency Plan. Check for any changes in health, caregiving support, or legal considerations every 6–12 months.

A contingency plan provides peace of mind and ensures that caregiving responsibilities continue as smoothly as possible in any situation. By taking the time to prepare, you create a sense of security for yourself, the person you are caring for, and those who may step in to help.

By being proactive, you can ensure stability, reduce stress, and create a support system that works for both you and the person receiving care and support.



Tips

First responders often look on the fridge for key documents such as Do-Not-Resuscitate (DNR) orders and Emergency Contacts. This is a great place to keep a copy of your important documents.

Set a calendar reminder or choose a significant date, like a birthday, to review and update the plan. This will help ensure you stay on top of any necessary changes.

“The groundwork we laid together for future planning in our family is still paying off, even though new challenges have arisen.”

— Caregiver

Workbook



Caregiving for someone comes with many responsibilities, and having a backup plan can help you feel more prepared for the unexpected. Having a plan in place can reduce stress for both you and your loved one. By completing this workbook, you ensure that care continues smoothly even if you need to step away unexpectedly.

How to Use this Workbook

- ♥ Read the Caregivers Guide to Contingency Planning. For downloads, we offer the full Guide or just the Workbook on its own. This also allows for easier updates down the road.
- ♥ Use this workbook to record who can step in if you're unable to provide care, as well as key information about your loved one's care needs. Carefully fill out each section with up-to-date information. You can either download the forms to fill out electronically or print them to complete by hand.
- ♥ Discuss your plan with family members, your care team and any backup caregivers.
- ♥ Share your completed plan with family, friends, or caregivers who may need to step in.
- ♥ Review and update your plan every 6–12 months or whenever there are major changes.

Contingency Plan

Date this plan was last updated

Care recipient name	Care recipient's healthcare number	Province of issue
Main caregiver name	Relationship to care recipient	Main caregiver contact information

In Case of Emergency Please Call

List one to three emergency contacts who can be reached immediately and who will assist in care.

Emergency contacts			
Name	Relationship	Phone number	Role in backup plan

Care Recipient has a DNR? <input type="checkbox"/> Yes <input type="checkbox"/> No	Location of DNR (Do-Not-Resuscitate) document
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Caregiver Role Assessment

List all the tasks you perform as a caregiver and identify who can take over each responsibility if needed.

Task	Who does it now?	Who can step in?
Personal care (bathing, dressing)		
Medication administration		
Meal preparation and feeding assistance		
Physical activities (walking, stretching)		
Transportation (appointments, errands, social outings)		
Housekeeping/laundry		
Financial management/bill payments		
Social/emotional/spiritual support		
Health care advocate		
Other		
Notes		

Care Recipient Information

This section captures key details about the care recipient. Providing clear and comprehensive information ensures that anyone on the care team and backup caregivers have a solid understanding of their needs. Include all relevant medical conditions, mobility challenges, and allergies to prevent disruptions in care.



Assertive communication addresses the problem and is not directed at the person.

Care recipient name	Preferred name
Date of birth	Where they were born
Family members names	
Career and/interests	Hobbies
Likes/dislikes	Major trigger(s) for anxiety
Other important information	
Primary medical diagnosis	
Document any diagnoses (conditions)	

List challenges or disabilities they face (emotional, mental, physical)	
List any care considerations needed for these disabilities/challenges	
Allergies	Mobility aids/Health care aids

Daily Care Routine

Understanding daily routines helps maintain consistency in care. List important tasks such as meals, medications, therapy (physical, occupational and other), and personal care. If the care recipient has specific preferences, requires assistance with certain activities, or can perform some tasks independently, be sure to add these in the 'Notes' section.

Time of Day	Meals	Medication	Therapy	Personal care
Morning				
Mid-morning				
Afternoon				
Evening				
Night				

Additional notes on routine, other tips and strategies for care

Care Team

List all individuals on the care team including family, family physician, friends, neighbours, case manager, pharmacy, private providers, etc.

Name	Role	Contact info

Medication Routine

Keeping track of medications and healthcare providers is crucial for emergency preparedness. Include all prescription and over-the-counter medications, along with dosages and schedules. Ensure healthcare provider contact information is accurate and easily accessible. **Tip:** you can find all this information on blisterpaks or on the labels of each medication pack. You can also ask your pharmacist to print off a list of all medication and doses for you the next time you fill a prescription.

Medication	Dosage	Time to administer	Prescribing doctor

Legal and Financial Checklist

Backup caregivers should know where to find important documents like Power of Attorney, healthcare directives, and wills. Document key financial responsibilities such as rent, utilities, and insurance to avoid disruptions.

Legal and financial checklist	
	Power of attorney (financial and healthcare)
	Advance care plan (representation agreement, advance directive)
	Will and estate documents
	List of financial accounts and bill payments
	Relevant health insurance and long-term care coverage

Emergency Preparedness

Note any specific instructions or strategies for the following emergencies. **Tip:** In your emergency contact and resources, consider including neighbours. If you have pets, be sure to list the person who can care for them if you're unable to.

Emergency preparedness
Natural disasters
Caregiver illness
Power outage
Sudden hospitalization
Other

Emergency contacts and resources	
Service	Contact information
Local emergency services	
Poison control	
Nearby hospital	
Other	

Additional notes



“You always have what’s just right for me, when I need it. Your workbook was so timely and completely relevant to my situation.”

— Mandy P, Family Caregiver

We are here to support you.

For caregiving-related questions and support, [call our B.C. Caregiver Support Line at 1-877-520-3267](tel:1-877-520-3267). We are available Mon-Fri, 8:30 am- 4 pm. Depending on your situation and needs, the next steps could include further one-to-one support with a [Caregiver Coach](#) or Caregiver Specialist.

To receive news and information by email, [sign up](#) for our Caregiver Connect newsletter and monthly enews. Visit our online [Caregiver Learning Centre](#) for resources and tools to support you on your journey.

[Join a family caregiver support group](#). We are continually expanding our list of community caregiver support groups around BC. Call our toll-free Caregiver Support Line, to find one near you and get together with people who “get it”. Learn from other family caregivers and share your advice to help others.

Doing everything on your own can make you feel like you’re alone. It helps to have someone to talk to.

Family Caregiving: Don’t do it alone.

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Don’t do it alone.**

Visit our online Caregiver Learning Centre:

www.familycaregiversbc.ca



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