



## ASSESSMENT FACTS FOR CAREGIVING

1. Age demographics of caregiver: almost 1/3 US adult population plays a caregiver role
2. Healthcare is biggest threat to retirement, caregiving is one of largest components of healthcare (time, emotional, personal health)
3. Baby boomers have added caregiving, the equivalent of a part time job, to their responsibilities
4. The average caregiving hours per week is 20 unpaid hours
5. Caregivers needs
  - Where to get resources
  - How to Plan
  - How to plan for Emotional, Mental and Physical support for care recipient
  - The 3 D's of Caregiving (Diagnosis, Day to Day, and Dealing with Death)
    - [The Caregiver's Toolbox](#)

**NEED TO PLAN OR THINK THROUGH**

# **THIS DURING TRANSITION PLANNING.**

## **KEY ASSESSMENT QUESTIONS:**

1. What are the ages of your parents or your spouse's parents?
2. How is their current health situation?
3. Who is currently caring for them?
4. Do they live near you? If not, how far?
5. How has your family planned for long term care for you, your spouse / or you and your spouse's parents?
6. How far do you live from them?
7. Are you, or have you been the primary caregiver for a loved one?
8. If your answer is yes,
  - A) Did this come as a surprise to you?
  - B) How many hours a day do you spend in the physical, medical, emotional, and spiritual support of this person?
  - C) Is this a short term or a long term diagnosis?
  - D) Who handles your loved one's medication management?
  - E) Where do you receive your greatest support? Friends / Family / Church / Feel pretty much on my own.
  - F) How do you communicate with your family
    - i. About your needs
    - ii. About the loved one's needs?
9. Have you had conversations with your family on who does what and how each family member will help with caregiving?
10. What are the resistance factors you think you will face if your loved one needs assistance or skilled nursing ?
11. What family members have been involved in the planning for a loved one's caregiving needs?
12. Who handles the management of bills, insurance?
13. How confident are you in their ability to handle this?
14. Who is handling the logistics of physician conversations and appointments for the care recipient?
  
15. How confident are you the current home situation is safe for the care recipient?

*continued*

# The CAREGIVER'S TOOLBOX



16. Who handles the medical management of the care recipients medicine?
17. Who is handling the logistics of physician conversations and appointments for the care recipient?
18. How confident are you the current home situation is safe for the care recipient?
19. How are you ensuring that the caregiver is being taken care of as well? Quite often the spouse is caring for the caregiver and is at risk as well.
20. How are you prepared for understanding where the key legal and financial assets are located and appropriated?
21. Have you had the conversation with family members and the care recipient around these matters?
22. Do you have proper authority and controls in place for care in these matters?

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## Disruptive Demographics

# CARING FOR THE CAREGIVER: HOW EMPLOYERS CAN HELP EMPLOYEES CAUGHT IN THE MIDDLE

**Joseph F. Coughlin, Director, Massachusetts Institute of Technology AgeLab**

Being forced to juggle conflicting demands is always an unpleasant, exhausting experience. Today, there is an entire generation of American workers who find themselves in precisely this position. Known as the sandwich generation, these people — approximately 40 to 60 years old — are caught between caring for their aging parents, who increasingly need their help with day-to-day activities, and their children, whether young children who are still at home or adult children who have suffered during the lackluster economy and need financial support and/or a place to live.

As it happens, members of the sandwich generation are in their peak earning years, when they are most critical to their employers, and when they should be saving aggressively for their own retirement. These employees want to perform well at work and advance their careers. But it's hardly surprising that a sick elderly parent and a needy child at home will create emotional and financial duress.

