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- Case Manager Initial Assessment. A geriatric case manager — a social worker who specializes in evaluating the everyday needs of an elder — can come to your elder's home and determine which services s/he requires. If you are a long-distance or working caregiver, you may want to hire a case manager to set up appropriate community services (home-delivered meals, a home health aide, or a housekeeping service) for your older relative.

Planning the Meeting

Once you've gathered information about your relative, begin talking to family members about holding a meeting to address concerns and plan for an elder's future. Many families agree to hold such a meeting before or after a holiday celebration when everyone is together. This initial meeting will lay the groundwork for more research and decision-making.

Despite all your best efforts, you may find that elder care issues have a way of reminding family members of unresolved rivalries and tensions. This "baggage" can interfere with the teamwork needed to make decisions and carry out plans. Do any of these roadblocks sound familiar?

- Siblings who perceive that the parent or elder likes one adult child best. This might bring out suspicions or competitions at a family meeting.
- An older relative who refuses to attend a meeting or resists the idea. S/he may insist that "everything is fine."
- One sibling or relative who takes on most of the caregiving responsibilities. Others may be reluctant (or refuse) to offer assistance.
- Some family members who hesitate to get involved. They may see themselves as unimportant. Perhaps they feel decision-making power is held by others.

You probably have a good idea how your family members will react to a discussion of your elder's care. If you suspect fights may erupt, you might want to get together with a therapist, clergy member, or support group ahead of time for help in addressing family issues. You might decide, if family members agree, to invite a professional familiar with your elder's situation to your meeting. A family counselor, social worker, or a geriatric case manager can report on his/her knowledge of your elder and help lead the meeting. Your older relative's doctor may also be a good resource in opening a dialogue.

You can minimize negative family patterns by clarifying meeting goals when planning the gathering with family members. Talk about the answers to these questions with each relative and see if you can find a general consensus around the meeting agenda:

- What is the purpose of the meeting?
- Who should attend? Whose cooperation is necessary?
- Who will lead the meeting?
- What is the desired outcome?

At the Meeting

Your most important goal for the meeting is to help everyone keep a cool head and work together on making plans for your elder's future. Try to include your elder in the planning as much as possible. If you are leading the meeting, be sure to keep everyone on task. Before the meeting you might want to share these basic ground rules:

DO:

- Have your older relative present to participate in at least a portion of the meeting.
- State the purpose of the meeting.
- State the desired outcome of the meeting.
- Set priorities.

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DO:

- Provide equal opportunity for everyone's input.
- Clarify how the family will maintain contact regarding ongoing needs as the plan is carried out.
- Summarize the meeting at its conclusion to ensure everyone understands what decisions were made.

DO NOT:

- Discuss unrelated issues.
- Ignore your older relative's input or preferences.
- Attack or blame others.
- Interrupt others.
- Assume others share your knowledge of your older relative or elder care options.

Remind family members to save small talk for after the meeting. Then, everyone can take the time to enjoy a job well done, socialize, and enjoy each others' company.

Use this basic agenda for your meeting:

- **Express common values.** At the start of your meeting, clarify the family's shared goal of assuring appropriate care for your elder, now and in the future. Encourage relatives to come together around mutual values and objectives.
- **Share information.** Distribute any written reports or evaluations you've received from the elder's doctor or other specialists. You might also describe any conversations you've had with specialists about your elder's daily needs. If you've invited a professional to join the meeting, ask him/her to share an assessment of the elder and recommendations for home repairs, services, or alternative housing.
- **Resolve disagreements.** If family members differ about how to solve elder care concerns, ask each person to write out a wish list of ways the situation could be improved. Then compare lists to see where commonalties lie. Be sure to get input from your older relative.
- **Find understanding** After hearing the evaluation and resolving differences, your family may agree on a solution. The family might decide that your elder needs home services, such as an aide to help with bathing or Meals on Wheels. They may choose to put some effort into remodeling hazardous areas of your elder's home. They may agree that the relative needs to move to an assistive living facility. If relatives can't agree, you may decide to try a plan for a limited period of time, then assess its success or failure.
- **Delegate tasks.** Each family member (even those who live far away) might take on responsibilities for making the plan work. Your sister might agree to find out about home health services; your brother might look into which services your elder's health insurance will cover. If your elder's home needs renovation to boost safety, family members might agree to contribute financially, help with minor repairs, or buy and deliver required materials. At the meeting, fill in the Chart of Family Elder Care Tasks to record tasks that family members will carry out and the agreed date of completion. Be sure to follow up with another meeting or perhaps a phone conference to determine further action.

For more information or a list of other MFS Heritage Planning educational materials on helping your parents, your children, or yourself, contact your financial adviser.

Chart of Family Elder Care Tasks

Tasks	Family Member	Proposed Completion Date	Follow-up Plan