

Care Partners Planning Together

Care Partner Tool Kit

When the need arises to talk to a loved one about their future care, and there is time to gather information, you will feel more confident having some basic information and the beginning of a plan. Below are some ideas to prepare for the hard conversations including conversation starters and other tips for planning.

Preparation for the Hard Conversations

There are many conversations to have when entering a care partner relationship. Preparation for these conversations can make them smoother and less tension filled.

- First, determine your support team. Who are other family members that need to be part of the decision-making process for your loved one? This does not have to be only the immediate family but may extend to members of the extended family, or close friends, those who know the person the best.
- Once you have made a list, have a conversation whether in person or online, and be sure if you are the convenor that everyone understands that you bring your concerns out of deep love.
- Determine what others in the support team have witnessed and what concerns were raised. The more information you have, the better the decision around needs you can make.
- Determine the willingness of each person to participate in the long-term care giving that will be needed. Think about different roles people could take. Being a care partner is not a solo job – this is a mandate that allows you to self-care. (The Roles and Responsibilities Quicksheet in this [Care Partner Tool Kit](#) may be helpful as well.)
- Be an investigator and think about what information you need and what you already possess. (The Resource Roadmap in this [Care Partner Tool Kit](#) and the other Quicksheets may help in gathering information.)
- If one is looking for care facilities of any level – do on-site visits. More than one set of eyes helps in this process. Additionally, males and females tend to see different strengths and weaknesses. ([Checklists](#))
- If possible, have conversations before a crisis occurs. The ability to have multiple conversations and to not be under pressure to act quickly causes less stress for everyone.

- Be prepared to receive resistance from some of the immediate family and be prepared to answer in understanding and support of the loved one you are advocating for.
- Remember to self-care from day one of being a care partner. You need to be able to keep up your own health, energy, sense of humor, and peace of mind to be of worth to yourself and your loved one. (Finding a [support group](#))
- What might be the most difficult part of the conversation for you? Do you expect resistance to change? Are you asking that your childhood home be left behind? Are you asking the care receiver to make a major out of state move?

When you are ready – information gathered, a support team to help and you have the beginnings of a plan, you are ready to have the conversation.

Conversation Starters and Tips

How to Start

Look for an opening to begin the conversation with your loved one. If other members of your support are with you, make sure no one feels 'ganged up on.' Keep it casual:

- "We have been thinking about having our wills and power of attorney drawn up just so we have them for the children. How did you go about doing this?"
- "The children have asked me to let them know where our important papers are, and I realized I probably should know where yours are."
- "We are concerned about you living in this home by yourself all the time. It is so much to keep up with and the yard work alone is overwhelming."
- "I feel like the traffic in this area seems to have doubled and getting around town must be hard in the rush hour times. Are you ever concerned about getting to your doctor appointments on time? Do all these people on the road ever scare you?"

Always Remember

Be respectful of your loved one's desires. Include them in any plans being made on their behalf, even if they may not be totally cognitive of every detail. Let them see your love and concern for them!

Have a Point Person

When your loved one has a question about the process or anyone involved in the planning process, there needs to be one person to receive these questions. There may be conversations to help determine the answer, but the same person should always be supplying the information needed.

Be Positive

Few people like major changes in their lives. Always find positive things to say about what is happening. Name things that will make it better for the care receiver. You may even include how it will positively affect the care provider. "It will be wonderful to have you near me so I can pop in to take you shopping." Or "you can attend the children's concerts. It will be great!"

Review Finances

One of the areas people are most like to keep private is their financial standing. It is important that you as the care partner understand the finances and limitations. This includes housing, transportation, and health insurance. Many are shocked to learn how little [Medicare](#) covers in terms of care in a nursing

home, assisted living residence, etc. One will need to know what health coverage they have, investments, bank accounts, value of home, and the existence of long-term care insurance.

Some questions might include:

- Is there debt that needs to be accounted for as you move forward?
- Are they able to handle day-to-day financial obligations?
- Are they able to determine what is a scam or fraudulent request for money?
- Are you confident about their handling of money and financial institutions or do they distrust anyone 'handling' their money?

Be sensitive to your loved one's feelings about what they know to be 'theirs.' Be reassuring that no one is going to take what they have earned away from them.

Level of Care

Deciding what level of care is needed or making a change is a major decision. Gather input from health care providers, from your observations, and begin [research](#).

Answer these questions to begin the process:

- Do they have needs on a daily basis for the simple things like bathing, dressing or meal preparation?
- Do they have limited mobility?
- How much medication are they taking? Are they able to safely manage dosage and schedule for taking each? Can they safely manage trips to the pharmacy for refills or can they be delivered?
- Is it possible for your loved one to remain in their current home with limited outside help? Can they remain there with simple changes like handrails on staircases, grab bars in tubs and showers or addition automatic night lighting? The first and primary goal is safety and comfort.

This Quicksheet is part of the [Care Partner Tool Kit](#) where you can find additional Quicksheets on other Care Partner topics and a Resource Roadmap with websites and books. For additional resources see the resource library page for the partners in this project [POAMN \(www.poamn.org\)](http://www.poamn.org) and [APCE \(www.apcenet.org\)](http://www.apcenet.org) or the [Office of Christian Formation \(www.pcusa.org/formation\)](http://www.pcusa.org/formation)

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