

# CAREGIVER

Health, Wellness & Resilience



COMMUNITY FOR  
CAREGIVERS

# WELCOME

Hello and welcome to this course on Caregiver Health, Wellness & Resilience. We are so excited that you are part of the Community for Caregivers and hope you find strength and support here!

This workbook provides you with all of the tools and activities we cover in this course. It also gives you space to write your thoughts and action plans as we go through each section.

Please save a blank copy of this workbook so you always have it for reference. As your situation changes, you may find yourself wanting to revisit the principles taught in the course.

Go ahead and PRINT this now so you can begin writing. Let's get started!



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# INTRODUCTION

As a caregiver, you are providing a noble and benevolent service worthy of so much praise and admiration. Being a caregiver can be extraordinarily rewarding and a personally powerful experience, but it can also create an overwhelming and stressful situation.

You are likely at some point or another to feel physically drained, emotionally uncertain, socially isolated, or financially strained during that journey. This course is designed to help you be aware of your own needs and how to maintain personal health, wellness, and resilience while serving in the important duty as a caregiver.



My name is Matt—and this course has grown out of my personal story and really the stories and experiences of so many others.

I grew up with my grandparents in a small Idaho town. I lost my mom just after childbirth, so I never knew her—and my dad went in a different direction. I called my grandma and my grandpa mom and dad—because they were, and they were amazing. I became a caregiver in my teens. My dad—my grandpa—passed away when I was 23, and I served as a primary caregiver for my mom for the next 12 years. Watch my video in the course to learn more about my journey and what I learned in those rewarding, but tough years of my life.

*1 in 5 Americans is a caregiver, that's 53 million caregivers just in the United States*

*On average, caregivers of adults provide care for 4.5 years, with 29% of caregivers providing care for 5 years or longer*

2020 AARP Caregiving Report - US

# TAKING CARE OF YOU

We need to strengthen, nourish, and care for the caregiver. For most of you participating in this course—that means strengthening, nourishing, and helping YOU. You need to take care of you.

So many caregivers just don't think about this—and it's for a variety of reasons. One reason, they're caregivers—so they're selfless—and it feels just plain wrong to put themselves at the top of their to do list. Another reason, their personal situation doesn't feel urgent. So, while their many caregiving responsibilities do feel urgent, their personal things just don't. Or, a very common explanation we get is that caregivers are busy juggling a hundred things and to stop the madness and calm the chaos of what's on their plate, they can put their own needs on the back burner, or the side burner.

The problem with this approach is that, if you neglect yourself, you slip into a black hole that not only causes you problems down the line, it can also hijack the care you want to give to your loved one. This is a common situation.

*3 out of 4 caregivers report providing care to be stressful, and more than half of those found it to be overwhelming*

*1 in 4 caregivers report having difficulty taking care of their own health. About 85% of family caregivers in the U.S. do not have any respite care.*

2020 AARP Caregiving Report - US

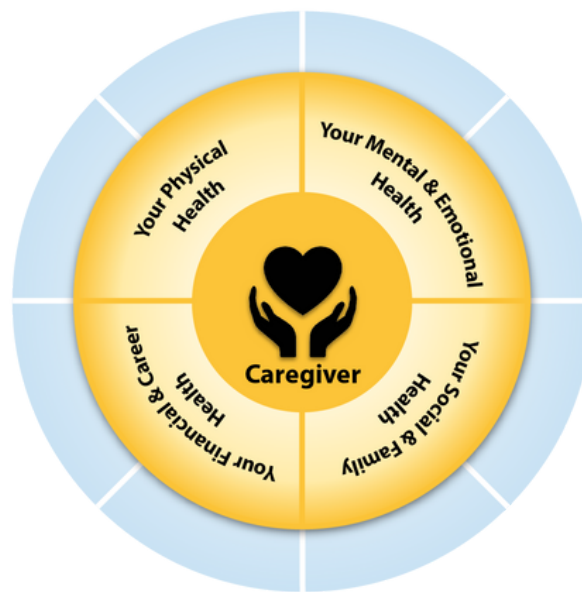
Respite care is care that relieves the caregiver from their duties so they can get rest, recharge, revitalize their focus on their lives. In addition, depression affects 20 to 40% of caregivers. And burnout—which comes in many forms, is very commonly reported.

# TAKING CARE OF YOU

Stephen Covey, author of the “7 Habits of Highly Effective People,” taught as the 7th habit, “Sharpen the Saw” which means taking care of you.

The first thing on the top of the list has to be keeping you, yourself, healthy, well and resilient.

What does a healthy, well and resilient caregiver look like? We’ve identified four elements that we will outline in this course.



- First, your physical health. How you’re doing physically—mobility, sleep, diet, exercise, etc.
- Second, your mental and emotional health. How’s your anxiety, your worry, your anger, your bitterness?
- Third, your social and family health. How are the relationships that matter the very most in your life? Are they receiving nourishment and attention?
- And lastly, your personal financial and career health.

All of those different areas of health have to be strong for you to be able to give the very best of yourself to the caregiving situation.

# CAREGIVER HEALTH CHECK-UP

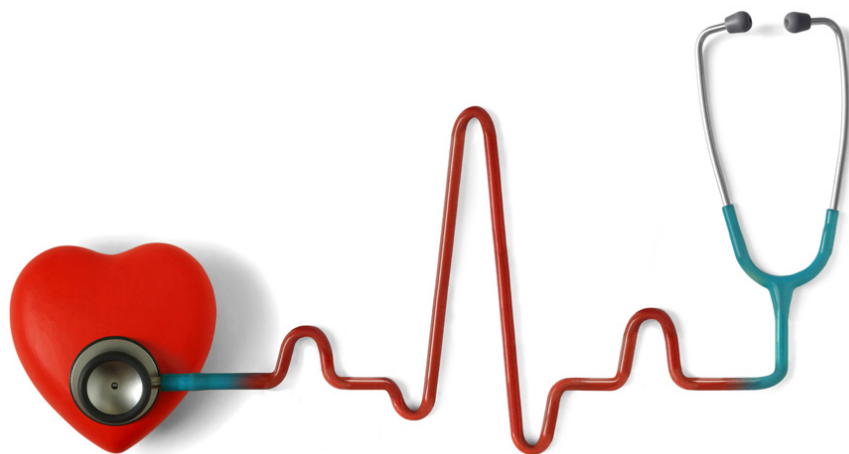
Our very first activity will be to take an assessment that we call the Caregiver Health Check-up.

The Caregiver Health Check-up will give you a good picture of where to start. It will trigger your thinking and self-evaluation of how well you take care of yourself in the four areas that we mentioned. Most people who complete the survey report that they gained a super amount of value from what the questions taught them. So, be really thoughtful as you take the assessments.

You can access the online versions—both the Quick Check-up and the Complete Check-up—through your course, under the section: Caregiver Health Check-up. The online versions help us to gather important data and we will send you a digital copy of your answers.

To access the printable versions of the check-ups, please see the Appendix at the end of this workbook. (Starting on Page X)

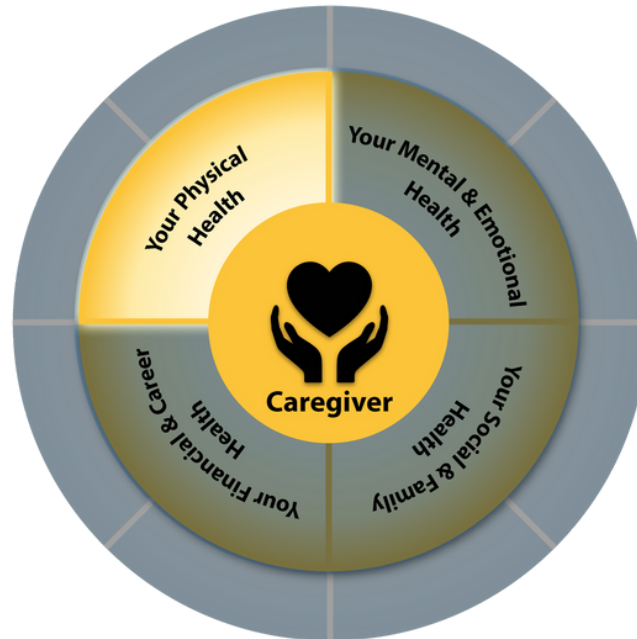
Return to your course after completing the check-up to watch the video on Check-up Results.





# PHYSICAL HEALTH

Nutrition, Hydration, Exercise, Sleep, and Stress



## Caring for your own personal health as a caregiver is essential!

This chapter will explore ideas to help you increase your energy levels, reduce your stress levels, and strengthen your physical capacity as you are working to provide the very best care.

Taking time for yourself to focus on your own physical health is going to offer many benefits to you and your loved one(s). It will help you:

- Work faster and with greater efficiency, thus reducing the time and energy that you have to spend on caregiving tasks
- Access increased strength and stamina to prevent injuries and burnout
- Navigate with agility and mobility to get you through less than ideal situations
- Be alert and awake as you manage all the complexities of providing care



# HYDRATION

How is your water intake? Could it be improved? Write down some ideas to help you in this area.

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# EXERCISE

Some health benefits occur immediately after an episode of physical activity. Other benefits begin with as little as 60 minutes a week. Research shows that a total amount of at least 150 minutes a week of moderate-intensity aerobic activity, such as brisk walking, provides substantial health benefits and consistently reduces the risk of many chronic diseases and other adverse health outcomes.

- *Physical Activity Guidelines for Americans, 2nd Ed. (health.gov)*

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## Plan of Action

Use this space to create an exercise plan.

Activity ideas could include: taking a walk around the neighborhood, lifting weights or using resistance bands, doing jumping jacks, stretching, or completing an aerobic workout at home or at the gym.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Activity:	Activity:	Activity:	Activity:	Activity:	Activity:	Activity:
Time and for how long:	Time and for how long:	Time and for how long:	Time and for how long:	Time and for how long:	Time and for how long:	Time and for how long:
Reminder and Accountability:	Reminder and Accountability:	Reminder and Accountability:	Reminder and Accountability:	Reminder and Accountability:	Reminder and Accountability:	Reminder and Accountability:

# SLEEP

Are you getting 7-9 hours of sleep per night? If not, what ideas would you like to try in order to get more sleep?

If your sleep is physically disrupted by your care situation, consider these ideas:

- Hire respite care staff or coordinate with community volunteers
- Ask family members, friends, or neighbors to sit with your loved one
- Use a baby monitor to easily check on your loved one

If you are losing sleep due to stress or other mental / emotional factors, here are some ideas that might make it a little better:

- Go to bed and wake up at the same time every day.
- Use meditation and exercise to relax and reduce anxiety and stress.
- Don't eat large meals, or drink caffeine or alcohol late in the day.
- Avoid distractions such as cell phones, computers, or televisions at night.
- Use a sound machine or fan for white noise.
- Adjust temperature and lighting to cool and dark.
- Clean your bedroom and determine if you need a new mattress or bed.

## Notes / Ideas

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# STRESS

Stress will be covered in more depth in the next Chapter: Caregiver Mental & Emotional Health. Write any thoughts on stress from this chapter here.

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# MENTAL & EMOTIONAL HEALTH

Challenges / Stigma, Mindfulness, and Stress



**We KNOW that there is a strong relationship between your caregiving and your mental and emotional health.**

This chapter will explore ideas to help you understand what we are really talking about when we say Mental and Emotional health. It covers mental and emotional issues, but it also includes our psychological health and our spiritual health. It's the part of us that manifests in thoughts, feelings, moods, attitudes and more.

We'll cover:

- How to understand the challenges and let go of stigma
- The practice of Mindfulness and how it can bring peace to your caregiving responsibilities
- Managing your stress and discovering the areas where you need additional help

# CHALLENGES AND STIGMA

*Feelings of stress, burden, anxiety, anger, bitterness, guilt, depression, and overwhelm are common to caregivers.*

*You are not alone if you have felt—or are currently experiencing—one or more of these mental health challenges.*

We have to overcome the stigma of getting help for our mental health. Could you use help with any of these mental and emotional challenges? Is there something stopping you from getting that help?

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## MINDFULNESS FOR CAREGIVERS

Mindfulness is an incredibly effective practice to help caregivers reduce stress and anxiety.

### Complete the Mindfulness Activities

"Grounding Practice" - Insights from a Mindfulness Coach

"Nourishing the Caregiver" - Mindfulness Practice



Before I tried the activities I felt:

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During the activities I felt:

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After the activities I felt:

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# MANAGING STRESS AND EMOTIONS

Note: This reflection activity is based on current research and therapeutic practices, but is not meant to replace the care or advice given from medical professionals. This stress thermometer scale is to be used as a tool, the word descriptions may not reflect your range of emotions and you may not experience these emotions in the sequence shown below.

This reflection activity is a tool to help you:

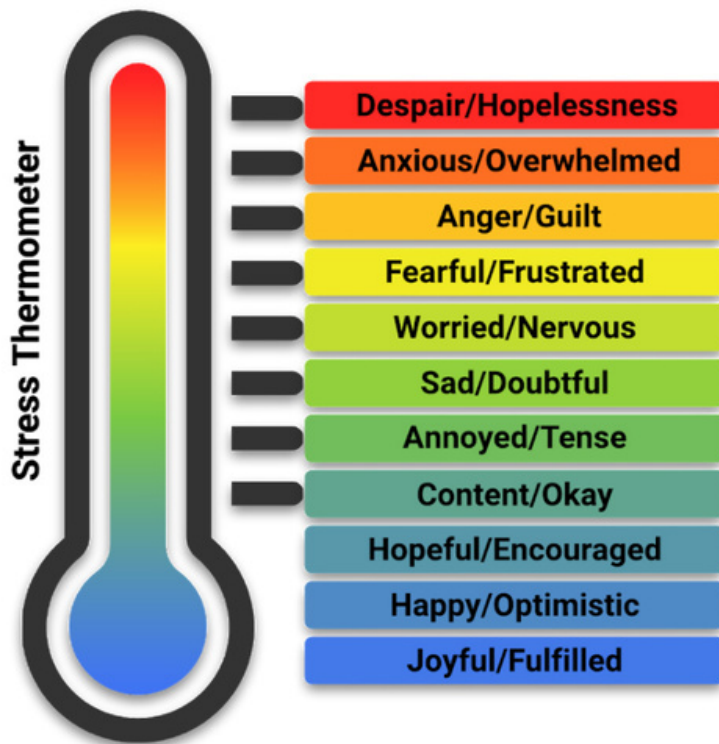


1. Identify and label your stress levels
2. Observe where you feel stress in your body
3. Discover the triggers that activate or increase your stress
4. Recognize aspects of stress that you can control
5. Create a meaningful action plan to prevent and lower stress

## The Stress Thermometer

1. Become Self-Aware - Identify and label your stress levels

How do you feel right now? Acknowledge your thoughts and feelings; they are valid. Let yourself feel what you are feeling right now. Circle the words that describe your feelings? Add words as needed.



# MANAGING STRESS AND EMOTIONS

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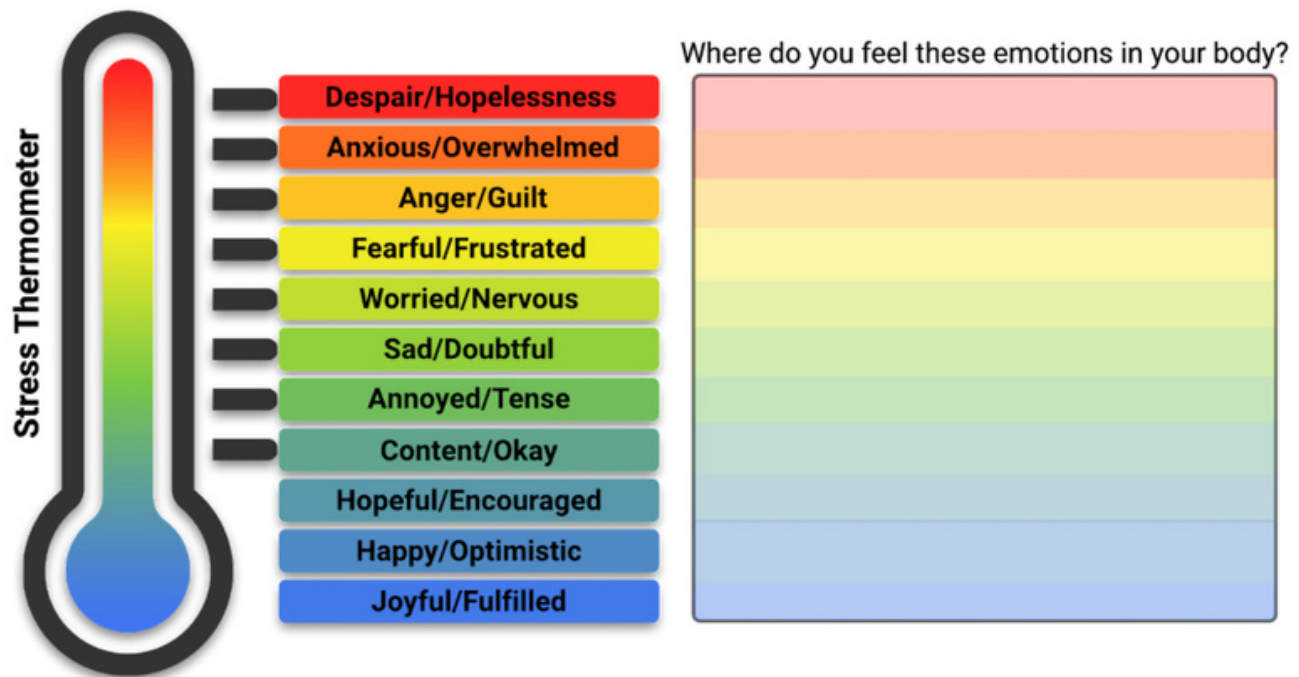


1. Identify and label your stress levels
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## The Stress Thermometer

2. Connect Mind & Body - Observe where you feel stress in your body

Where in your body do you feel stress? In your gut; heart; tensed shoulders; headaches; low energy; other? This can help you recognize signs of stress early. Write down in the box below where you think you feel your stress to help you connect your mind and body.



# MANAGING STRESS AND EMOTIONS

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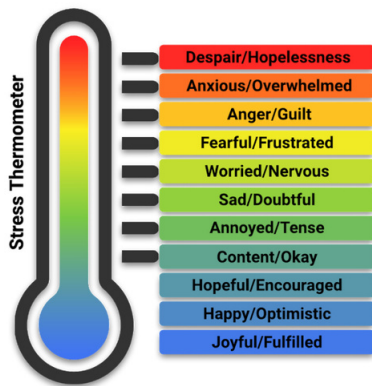
## The Stress Thermometer

3. Identify Triggers - Discover the triggers that activate or increase your stress

What do you think triggers your stress? What increases your stress levels?

Think about where you placed yourself on the stress thermometer.

Write in the colored boxes below what contributes to you feeling this way.



# CONTROLLING WHAT YOU CAN

Note: This reflection activity is based on current research and therapeutic practices, but is not meant to replace the care or advice given from medical professionals.

This reflection activity is a tool to help you:



1. Identify and label your stress levels
2. Observe where you feel stress in your body
3. Discover the triggers that activate or increase your stress
4. Recognize aspects of stress that you can control
5. Create a meaningful action plan to prevent and lower stress

## Sort Your Spheres

4. Sort Your Spheres - Recognize aspects of stress that you can control

Sort between what you *can* control, what you *can* influence, and what you *can't* control or influence.



What you **can** control



What you **can** influence



What you **can't** control or influence

# CONTROLLING WHAT YOU CAN

Note: This reflection activity is based on current research and therapeutic practices, but is not meant to replace the care or advice given from medical professionals.

This reflection activity is a tool to help you:



1. Identify and label your stress levels
2. Observe where you feel stress in your body
3. Discover the triggers that activate or increase your stress
4. Recognize aspects of stress that you can control
5. Create a meaningful action plan to prevent and lower stress

## 4. Sort Your Spheres Cont. - Recognize aspects of stress that you can control

It may be difficult to recognize what is and what is not within your control or influence. If needed, reference the guiding questions below to help push your thinking and see if there is an aspect of a trigger or situation you can control or influence in a way you might not have noticed before.

Could I have greater control or influence if I . . .

- gained additional information?
- developed a new skill?
- developed, changed, or broke a habit?
- changed something in my environment?
- reached out to someone else?
- shifted my priorities or mindset?

# CREATE AN ACTION PLAN

Note: This reflection activity is based on current research and therapeutic practices, but is not meant to replace the care or advice given from medical professionals.

This reflection activity is a tool to help you:



1. Identify and label your stress levels
2. Observe where you feel stress in your body
3. Discover the triggers that activate or increase your stress
4. Recognize aspects of stress that you can control
5. Create a meaningful action plan to prevent and lower stress

5. **Take Action** - Create a meaningful action plan to prevent and lower stress

What could I do to **prevent** my stress levels from rising?

What could I do to **lower** my stress levels as needed?

# BONUS: GUILT REGULATOR

Note: This reflection activity is based on current research and therapeutic practices, but is not meant to replace the care or advice given from medical professionals. This guilt meter is to be used as a tool, the word descriptions and levels may not reflect your range of guilt and you may not experience these emotions in the sequence shown below.

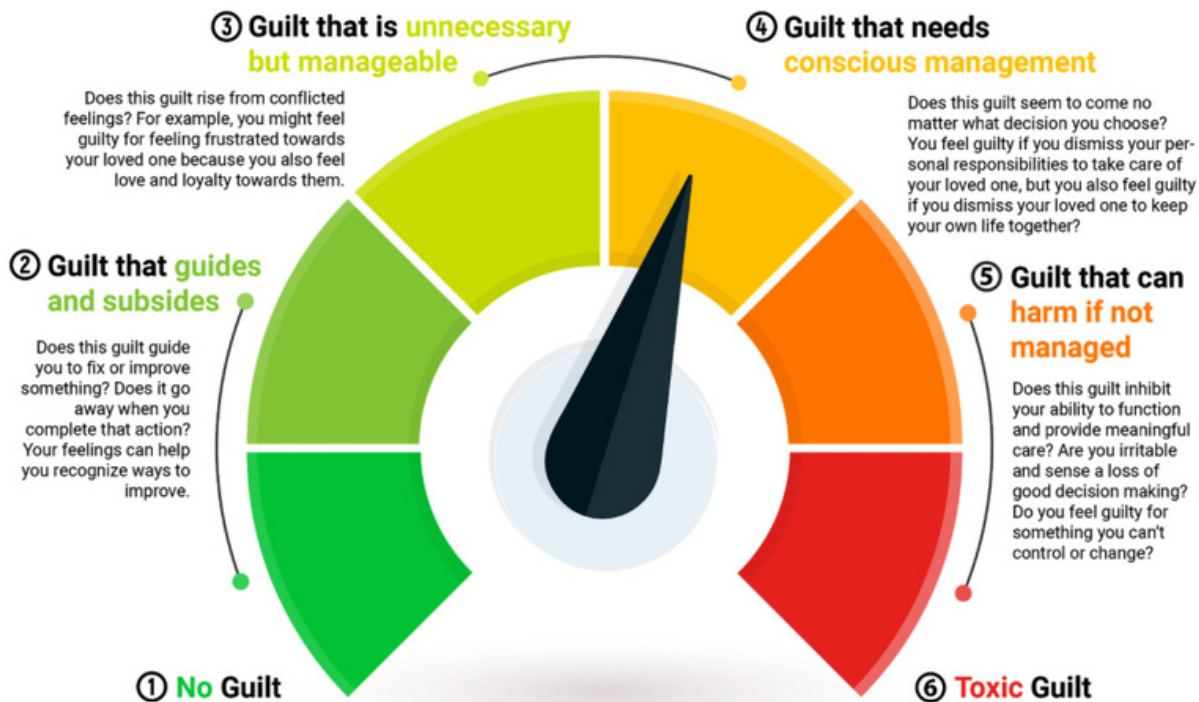


This reflection activity is a tool to help you:

- Recognize your guilt level
- Create an action plan to prevent and lower your guilt

## 1. Assess Guilt - Recognize your guilt level

Read through the guilt meter below, where do you feel your guilt levels are? Acknowledge your thoughts and feelings; they are valid. Understand that you likely won't be able to avoid guilt while being a caregiver. Let the good guilt guide you and acknowledge the rest as unhelpful and needing to be addressed.



# BONUS: GUILT REGULATOR

Note: This reflection activity is based on current research and therapeutic practices, but is not meant to replace the care or advice given from medical professionals.



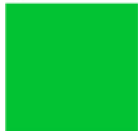
This reflection activity is a tool to help you:

- Recognize your guilt level
- Create an action plan to prevent and lower your guilt

## 2. Take action - Create an action plan to prevent and lower your guilt

Where did you place yourself on the guilt meter? Refer to the action ideas below and determine what you will do as you notice your guilt levels rising.

### ① No Guilt



**Action idea** - Strive to be mindful of how this feels for you.

### ② Guilt that guides and subsides



**Action idea** - Continue to let moments of guilt guide you to improve yourself.

### ③ Guilt that is unnecessary but manageable



**Action idea** - Reflect on your guilt and any underlying feelings. Recognize that your guilt may be a result of conflicting feelings and not negative actions on your part.

### ④ Guilt that needs conscious management



**Action idea** - Practice self-compassion. If a friend was in your shoes, what would you say to them? Seek to change your "ideal" to a more realistic goal.

### ⑤ Guilt that can harm if not managed



**Action idea** - Recognize that you may be feeling guilt for something you can't control or change. Label that guilt as unhealthy and remind yourself, "I did the best I could with the knowledge and resources I had."

### ⑥ Toxic Guilt



**Action idea** - Find a friend or family member to share how you're feeling. Seek the help of a qualified health professional as needed.

# ADDITIONAL IDEAS AND RESOURCES

To Help Improve and Maintain Caregiver Mental & Emotional Health

**Physical Health & Activity:** A strong mind-body connection exists such that physical activity and health can directly impact mental and emotional health.

- Practicing yoga
- Visiting with medical doctors
- Psychiatrists/psychologists
- Chiropractors
- Acupuncture and other non-Western medicine providers

**Social Activity:** A strong connection exists between your mental and emotional health and your social health. Too many caregivers find themselves feeling alone and isolated.

- Join a caregiver support group
  - Local/in-person
  - Online - Be sure to join the Community for Caregivers Facebook Group
- Time with (a) good friend(s)
- Join a fitness club or interest group

**Self-Reflection and Self-Care:** It is crucial to make yourself a priority and make time for yourself.

- Get rest and respite
- Keep a journal
- Keep a gratitude journal
- Perform breathing exercises
- Spend time in nature
- Make time for yourself. What fills your tank? Make a list and do something on it. Show yourself you are important to you.

**Spiritual Practice:** Connecting with a higher power can strengthen you.

- Connect with a faith community or spiritual group
- Recognize a higher power
- Practice principles of grace, forgiveness, and peaceful problem solving
- Personal devotional/worship habits (scripture, inspirational reading, prayer, spiritual meditation)

# ADDITIONAL IDEAS AND RESOURCES

Continued

**Service:** Research shows that when we help others, we feel better.

- Volunteer for a higher cause
- There are many places you can volunteer: Community centers, libraries, hospitals, faith organizations, animal shelters, food banks, etc.
- Or informally serve people around you (neighbors, family, friends)

**Therapy & Counseling:** There are wonderful tools to help guard and improve our mental and emotional health. There is power in sharing.

- One-on-one therapy (e.g., CBT, DBT, EMDR)
- Support groups
- Many providers have both in-person and online options

**Tapping Into Your Creativity:** Being creative improves your health.

- Visual arts (e.g., draw, color, sculpt, paint)
- Knit, sew, crochet
- Write
- Musical arts (e.g., sing, dance, play an instrument)
- Create in whatever way brings you joy and helps you feel “in the flow”

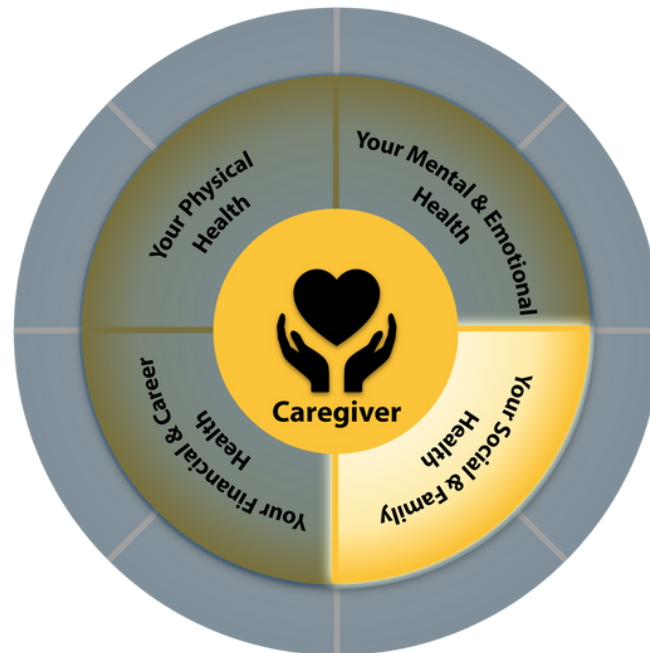
## **Emergency Contacts**

- Emergency Medical Services: 911
- National Suicide Prevention Lifeline: 1-800-273-TALK (8255)
- SAMHSA Treatment Referral Helpline: 1-877-SAMHSA7 (1-877-726-4727)

*\*This is not a comprehensive list, and as with all that is taught in this course, you are encouraged to seek help from qualified medical and mental-health professionals to obtain appropriate assessments and corresponding treatment plans.*

# SOCIAL AND FAMILY HEALTH

## Social Connection and Family Relationships



**Every caregiver needs to find balance in their social and family connections.**

Loneliness can wreak havoc on an individual's physical, mental and cognitive health. Perceived social isolation comes with adverse health consequences including depression, poor sleep quality, impaired executive function, accelerated cognitive decline, poor cardiovascular function and impaired immunity at every stage of life.

-Louise C. Hawkey and John P. Capitanio

We'll cover:

- Social Connection
- Caregiver Relationships
- Nourishing Relationships
- Adjusting Boundaries



# REFLECTION ACTIVITY: HOW CAN I MANAGE MY SOCIAL LIFE?

*Note: This reflection activity is based on current research and therapeutic practices, but is not meant to replace the care or advice given from medical professionals.*

*This social circles activity is to be used as a tool and the word descriptions may not reflect your particular social situation.*

This reflection activity is a tool to help you:

- Visualize your social time and the energy used towards your recipient of care
- Visualize how all of your social circles are impacted by your role as caregiver
- Visualize how you'd like to align your social circles with your personal values
- Plan ways to improve your social circles by nurturing certain relationships
- Plan ways to improve your social circles by adjusting boundaries with others

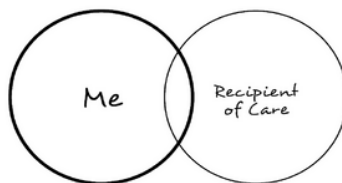
## 1. Become Self-Aware

*Visualize your social time and energy used towards your recipient of care*

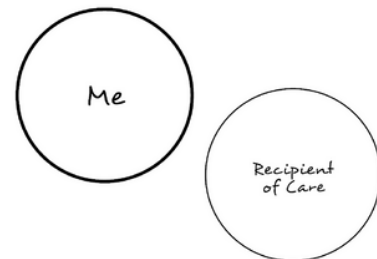
Look at the three examples and then draw how you feel your relationship is with your recipient of care in the diagram below.



**Example A:** Unsustainable relationship that needs adjusted boundaries

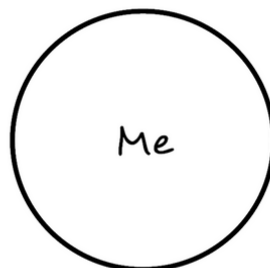


**Example B:** Nurturing relationship with appropriate boundaries



**Example C:** Disconnected relationship that needs nurturing

Visualize and draw your relationship with your recipient of care here:



# REFLECTION ACTIVITY: HOW CAN I MANAGE MY SOCIAL LIFE?

This reflection activity is a tool to help you:

- Visualize your social time and the energy used towards your recipient of care
- Visualize how all of your social circles are impacted by your role as caregiver
- Visualize how you'd like to align your social circles with your personal values
- Plan ways to improve your social circles by nurturing certain relationships
- Plan ways to improve your social circles by adjusting boundaries with others

## 2. Visualize your current social life

*Visualize how all of your social circles are impacted by your role as caregiver*

Now that you've visualized your relationship with your recipient of care, what other groups are a part of your social life?



Make a list of the social groups in your life. You'll use this list to create your own social circles diagram. This list may include: family (spouse/partner, children); extended family; friends/neighbors; co-workers; church or other community groups, etc.

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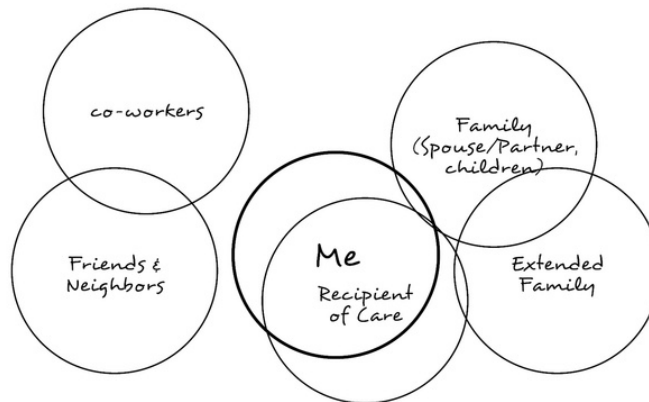
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Social situations vary, but below is an example of someone's current social circles. Think—how are your social circles the same? different?



Example of a caregiver's social circles where boundaries need to be adjusted with the recipient of care and other relationships need nurturing.

# REFLECTION ACTIVITY: HOW CAN I MANAGE MY SOCIAL LIFE?

This reflection activity is a tool to help you:

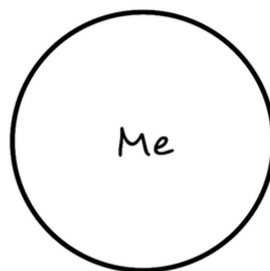
- Visualize your social time and the energy used towards your recipient of care
- Visualize how all of your social circles are impacted by your role as caregiver
- Visualize how you'd like to align your social circles with your personal values
- Plan ways to improve your social circles by nurturing certain relationships
- Plan ways to improve your social circles by adjusting boundaries with others

## 2. Visualize your current social life (continued)

*Visualize how all of your social circles are impacted by your role as caregiver*

Using the list of social groups you created, draw your own social circles diagram in the space below. Visualize how much time and energy you spend socially with each group by how much the circles overlap. Remember, this diagram does not need to be perfect. Use this diagram as a tool to help you visualize your current situation so you can help yourself recognize in what ways you'd like to change or improve your social circles. You will draw another social circles diagram after this one to represent your ideal social situation. For now, focus on your current social situation.

Draw your own current social circles diagram here:



# REFLECTION ACTIVITY: HOW CAN I MANAGE MY SOCIAL LIFE?

This reflection activity is a tool to help you:

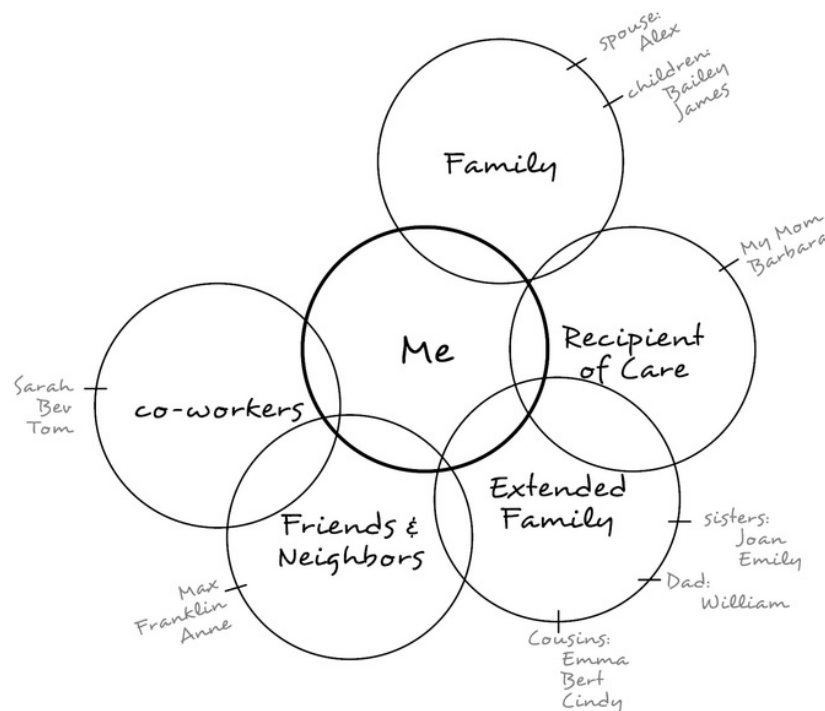
- Visualize your social time and the energy used towards your recipient of care
- Visualize how all of your social circles are impacted by your role as caregiver
- Visualize how you'd like to align your social circles with your personal values
- Plan ways to improve your social circles by nurturing certain relationships
- Plan ways to improve your social circles by adjusting boundaries with others

### 3. Visualize your ideal social life

*Visualize how you'd like to align your social circles with your personal values*

Reference your current social circles diagram you just drew, what would you like to change? Which social circles need adjusted boundaries? Which relationships need nurturing? Construct a new social circles diagram in the way that represents how you'd like your relationships to be. Consider adding names and additional circles to help you visualize your ideal circumstances.

Social situations vary, but below is an example of someone's ideal social circles.  
Think—how are your social circles the same? different?



Example of a caregiver's social circles where relationships are nurtured and boundaries are kept.

# REFLECTION ACTIVITY: HOW CAN I MANAGE MY SOCIAL LIFE?

This reflection activity is a tool to help you:

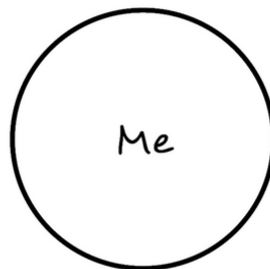
- Visualize your social time and the energy used towards your recipient of care
- Visualize how all of your social circles are impacted by your role as caregiver
- Visualize how you'd like to align your social circles with your personal values
- Plan ways to improve your social circles by nurturing certain relationships
- Plan ways to improve your social circles by adjusting boundaries with others

### 3. Visualize your ideal social life (continued)

*Visualize how you'd like to align your social circles with your personal values*

Referring back to your current social circles diagram you created, draw your ideal social circles diagram in the space below. Visualize how much social time and energy you would like to spend socially with each group by how much the circles overlap. Remember, this diagram does not need to be perfect. Use this diagram as a tool to help you visualize your ideal situation so you can help yourself recognize in what ways you'd like to change or improve your social circles. Consider adding names or additional circles when helpful.

Draw your own ideal social circles diagram here:



# REFLECTION ACTIVITY: HOW CAN I MANAGE MY SOCIAL LIFE?

This reflection activity is a tool to help you:

- Visualize your social time and the energy used towards your recipient of care
- Visualize how all of your social circles are impacted by your role as caregiver
- Visualize how you'd like to align your social circles with your personal values
- Plan ways to improve your social circles by nurturing certain relationships
- Plan ways to improve your social circles by adjusting boundaries with others

## 4. Who needs more time and attention?

*Plan ways to improve your social circles through nurturing certain relationships*

Which groups and/or individuals need more time and attention to bring their social circle closer and more inline with your ideal social situation? Make a list of the social groups and individuals who you'd like to spend more time and energy with. Then add what you feel you can do to build, strengthen, and nurture those relationships. Focus here on who needs nurturing, the next step will focus on creating or adjusting boundaries.

Social Group or Individual	What you can do to build, strengthen, and nourish the relationship

# REFLECTION ACTIVITY: HOW CAN I MANAGE MY SOCIAL LIFE?

This reflection activity is a tool to help you:

- Visualize your social time and the energy used towards your recipient of care
- Visualize how all of your social circles are impacted by your role as caregiver
- Visualize how you'd like to align your social circles with your personal values
- Plan ways to improve your social circles by nurturing certain relationships
- Plan ways to improve your social circles by adjusting boundaries with others

## 5. Where do boundaries need to be made?

*Plan ways to improve your social circles through adjusting boundaries with certain relationships*

Which groups and/or individuals need additional boundaries to bring their social circle more inline with your ideal social situation? Make a list of the social groups and individuals who you think would benefit from adjusted boundaries. Then add what boundaries need to be adjusted and what you feel you can do to set and keep those boundaries.

Social Group or Individual	What boundaries need to be adjusted in the relationship and what you can do to set and keep those boundaries

# REFLECTION ACTIVITY: HOW CAN I MANAGE MY SOCIAL LIFE?

This reflection activity is a tool to help you:

- Visualize your social time and the energy used towards your recipient of care
- Visualize how all of your social circles are impacted by your role as caregiver
- Visualize how you'd like to align your social circles with your personal values
- Plan ways to improve your social circles by nurturing certain relationships
- Plan ways to improve your social circles by adjusting boundaries with others

Now that you have completed the activity, you should have a better idea of how to align your social circles. Remember to come back to this activity any time you feel your social circles are out of balance.

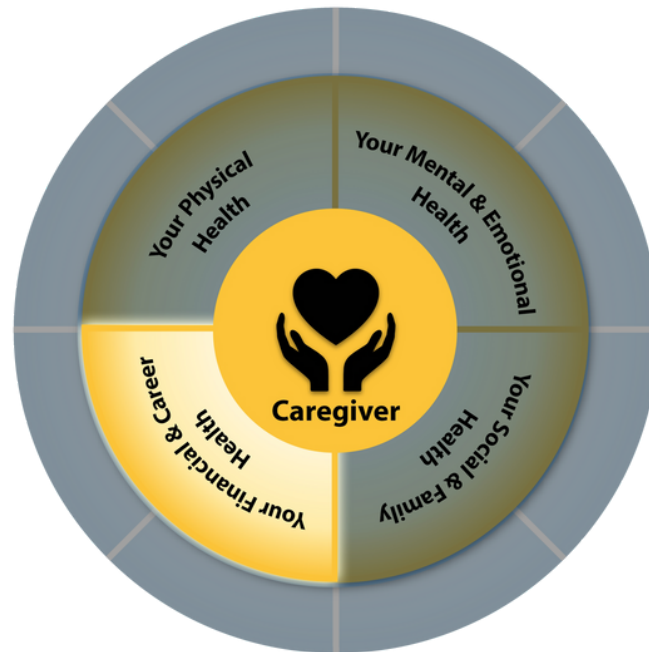
If you would like additional help, information, or ideas on how to nurture particular relationships or set boundaries with others, please share your questions with us in our Community for Caregivers Facebook group and / or email them to us at [support@communityforcaregivers.com](mailto:support@communityforcaregivers.com).

**Join our Facebook Group: Community for Caregivers**

[www.facebook.com/groups/communityforcaregivers/](http://www.facebook.com/groups/communityforcaregivers/)

# FINANCIAL AND CAREER HEALTH

## Burdens, Costs, and Resources



### Understanding your money, your savings, and your investments, as well as your liabilities and debts.

You can't be the best caregiver possible if you're not strong, stable, and healthy yourself. And it's as evident with your financial and career health as with any other component of your health.

Caregivers who are financially stable, meaning, they have stable income, stable assets and manageable debt, are able to offer care with less burden and more impact than caregivers who don't have such stability. When caregivers lose their income streams, or start to spend their own assets and savings on the situation of care, they threaten both their caregiving and their own futures.

# STRENGTHENING A CAREGIVER'S FINANCIAL HEALTH

## Financial Boundaries

*How is caregiving influenced by or how is it influencing this financial consideration? How will each of these financial categories be affected by your caregiving?*

Instructions: Take some time to think and write about (a) how you are currently using these financial categories to support your caregiving, (b) what you think the future might entail, and (c) how you can draw boundaries and make/strengthen deliberate plans for these categories.

Assets (What you have: Home, Car, Cash, Savings, Investments, Retirement Accounts, etc.)	
Liabilities (What you owe: Debts, Mortgages, Loans)	
Equity (What you own)	
Credit	
Insurance	
Trust, will, legal documents	

# STRENGTHENING A CAREGIVER'S FINANCIAL HEALTH

## Costs of Care and Available Resources

*As you watch the videos about financial considerations, this page is available to make notes on these four main areas.*

Instructions: Write your thoughts about how you may want to strengthen, learn about, or find additional resources to help you manage the situation of care.

The Costs of Care	
The Care Recipient's Resources	
Family Resources	
Government or Public Resources	

# FINANCIAL AID RESOURCE GUIDE

- Medicaid: Each state has their own benefits, coverage, eligibility, and rules. Some states may hire you as a paid caregiver, others may restrict pay to people who live outside the home of the care recipient. Check with your state's office.
  - Cash & Counseling Programs in 49 states. Also called Consumer Direction, Participant Direction, or Self-Directed Care. Most states have their own name for it: May hire family to act as caregivers.
  - Home and Community-Based Services Programs (HCBS): May provide assistance for in-home care and home modifications among other things.
- Long-Term Care Insurance: This may be helpful if loved one already has a policy. If not, it may be cost-ineffective as eligibility is based on health. Different from traditional health insurance. Covers expenses associated with long-term senior care services and support. Policyholder gets reimbursed a preselected amount to cover things such as therapy, nursing care, and activities of daily living (ADLs) (e.g., bathing, dressing).
- Veteran-Directed Home and Community-Based Services Program (VD-HCBS): Authorizes a monthly flexible spending account for purchasing goods and securing services for disabled veterans to live at home. May hire family to act as caregivers.
- Tax Incentives: Adult children caregivers who are younger than 65 may deduct the costs of qualified medical expenses and mileage that are greater than 10% of their adjusted gross income if they itemize their deductions. The IRS maintains a list of eligible medical expenses and exclusions. Discuss options with an accountant.
- The Family Medical Leave Act (FMLA): An eligible employee can take up to 12 weeks of job-protected unpaid leave to care for a parent who has a "serious health condition." Nine states provide paid leave: CA, CO, CT, MA, NJ, NY, OR, RI, WA, & DC.
- Paid Leave for Caregiving Employees: Some employers offer paid family leave.
- Unemployment. If you are fired or forced to quit your job because of caregiving responsibilities, your state may allow you to collect unemployment. Check with your state office.
- Area Agency on Aging (AAA). Network of 600+ non-profit organizations that serve the elderly population. Varied services are provided, but common ones include nutrition counseling and meal delivery, caregiver support, in-home care assessments, transportation, and insurance counseling. Search for local resources here: <https://eldercare.acl.gov>
- AARP Financial/Legal Resources: A variety of resources available through AARP at this web address: [www.aarp.org/caregiving/financial-legal/](http://www.aarp.org/caregiving/financial-legal/)
- PayingForCare.org: A website based in the UK, with useful resources, articles, and calculators to assist in determining how to fund long-term care.



# LANDSCAPE OF CAREGIVING

## The 8 Essential Elements of Caregiving



When the Landscape of Caregiving is managed and healthy, the health of the caregiver also improves, as they are linked and impact each other. Knowing and understanding all of the different elements of the caregiving journey allows you, as a caregiver, to get your arms around the care situation to create more stability, health, wellness, and resilience.





## Resources

- Family Caregiver Alliance: National Center on Caregiving, [caregiver.org](http://caregiver.org).
- Forbes.com, "What Our 42 Million Working Caregivers Need Most," 12/2/2013.
- Goyer, Amy, Juggling Work and Caregiving (E-book available from AARP).
- MetLife Mature Market Group, National Alliance for Caregiving, University of Pittsburgh Institute on Aging, "The MetLife Study of Working Caregivers and Employer Health Costs: Double Jeopardy for Baby Boomers Caring for their Parents (2010).
- National Alliance for Caregiving for ReACT (Respect a Caregiver's Time, Corporate Leadership for Employee Caregivers): Best Practices in Workplace Eldercare, March 2012
- Pew Research Center: Social & Demographic Trends (2013 data, [pewsocialtrends.org](http://pewsocialtrends.org))
- Monster.com: "Companies that include caregiver support in their employee benefits packages." <https://www.monster.com/career-advice/article/caregiver-support-employee-benefits-1117>
- Nonprofit Transamerica Institute, The Many Faces of Caregivers: A Close-Up Look at Caregiving and Its Impacts, Employment Status, September 2017
- US News and World Report, USNEWS.com, "6 Things Employees Should Know About the Family and Medical Leave Act," 6/26/2017
- The National Alliance for Caregiving and AARP, Caregiving in the U.S. 2020, May 2020
- Fidelity Investments American Caregivers Study, April 2021 // [Fidelity.com/Caregiving](http://Fidelity.com/Caregiving)

# Caregiver Health, Wellness and Resilience

## Caregiver Quick Check-up



## Caregiver Physical Health

*This section of the checkup explores your physical health, including your diet, exercise, sleep, care for existing conditions, doctor visits, etc.*

1. I consider the food choices I make overall to be...	Terrible	Poor	Fair	Good	Excellent
2. I exercise _____ days in an average week.	0	1 - 2	3 - 4	5 - 6	7
3. Across one week, I average _____ hours of sleep per night.	0 - 2	2 - 4	4 - 6	6 - 8	8+
4. The importance I assign to my physical health is best described as...	Not Important	Somewhat Important	Moderately Important	Quite Important	Extremely Important
5. I consider my overall physical health to be...	Terrible	Poor	Fair	Good	Excellent
6. The degree to which my overall physical health has been negatively affected by my role as a caregiver is...	Not at All	Some	Moderately	Quite a Bit	Extremely

## Caregiver Mental and Emotional Health

*This section of the checkup explores your mental and emotional health, including questions that examine stress, guilt, respite, depression, resilience, coping skills, spiritual practices, etc.*

1.	How would you describe your life's current stress level?	Not at all Stressful	Somewhat Stressful	Moderately Stressful	Quite Stressful	Extremely Stressful
2.	Describe the level of irritation, anger, or resentment you feel.	Not at all Angry	Somewhat	Moderately	Quite	Extremely Angry
3.	Describe the level of sadness/depression you experience (this includes feelings of hopelessness/worthlessness).	Not at all Sad	Somewhat	Moderately	Quite	Extremely Sad
4.	How much worry/anxiety do you feel for your life as a whole (not just the caregiving situation you are in)?	No/Very Little Worry	Some Worry	Moderate Worry	Quite a Bit of Worry	Extreme Worry
5.	How would you describe your ability and skills to cope and/or manage your thoughts and feelings?	Terrible	Poor	Fair	Good	Excellent
6.	The importance I assign to my mental/emotional health is best described as:	Not Important	Somewhat Important	Moderately Important	Quite Important	Extremely Important
7.	I consider my overall mental/emotional health to be...	Terrible	Poor	Fair	Good	Excellent
8.	The degree to which my overall mental/emotional health has been negatively affected/disrupted by my role as a caregiver is...	Not at All	Some	Moderately	Quite a Bit	Extremely

## Caregiver Social and Family Health

*This section of the checklist explores the health of your social interactions and family relationships.*

- |   |                      |                       |                         |                    |                        |
|---|----------------------|-----------------------|-------------------------|--------------------|------------------------|
| 1. How would you describe your level of loneliness/isolation in your caregiving role?   | Not at all<br>Lonely | Somewhat              | Moderately              | Quite              | Extremely<br>Lonely    |
| 2. What is the quality of your current relationship with your significant other/spouse/partner.   |                      |                       |                         |                    |                        |
| <ul style="list-style-type: none"> <li>- Terrible--We constantly fight and bitterly disagree about decisions and issues.</li> <li>- Poor--We are not close, we disagree, but it is not constant/bitter.</li> <li>- Fair--We make it work, but it's neither warm nor cold.</li> <li>- Good--We are mostly aligned and work well together, but it's not overly warm.</li> <li>- Excellent--The relationship is incredibly warm and loving, we are almost always aligned.</li> <li>- N/A - No significant other/spouse.</li> </ul> |                      |                       |                         |                    |                        |
| 3. What is the "average level" relationship you have with your family members?  |                      |                       |                         |                    |                        |
| <ul style="list-style-type: none"> <li>- Terrible--We constantly fight and bitterly disagree about decisions and issues.</li> <li>- Poor--We are not close, we disagree, but it is not constant/bitter.</li> <li>- Fair--We make it work, but it's neither warm nor cold.</li> <li>- Good--We interact well; we're mostly aligned, but it's not overly warm.</li> <li>- Excellent--The relationship is incredibly warm and loving, we are almost always aligned.</li> <li>- N/A - I do not have any family members.</li> </ul>  |                      |                       |                         |                    |                        |
| 4. Considering your total level of social interactions across all groups--family, co-workers, friends, and others--what amount of social interaction do you have?   | Less than<br>I need  | Just what<br>I need   | More than<br>I need     |                    |                        |
| 5. The importance I assign to my social and family health is best described as...   | Not<br>Important     | Somewhat<br>Important | Moderately<br>Important | Quite<br>Important | Extremely<br>Important |
| 6. I consider my overall social interactions/health to be...  | Terrible             | Poor                  | Fair                    | Good               | Excellent              |
| 7. The degree to which my overall social interactions/health has been negatively affected/disrupted by my role as a caregiver is...   | Not at All           | Some                  | Moderately              | Quite a Bit        | Extremely              |

## Caregiver Financial and Employment Health

*This section of the checkup explores your financial/employment health, including how much time is spent in your caregiving role.*

1. As objectively as you can, select which statement best describes the amount of time you spend as a caregiver:
  - I spend entirely too much time as a caregiver and my life is out of control because of it.
  - I spend more time than I likely need to spend as a caregiver and would like to reduce those hours.
  - I think I spend just about the right amount of time as a caregiver--it's in balance and I am satisfied.
  - I should spend more time than I do as a caregiver and would like to increase those hours.
  - I spend entirely too little time as a caregiver--and have a strong desire to spend more time.
  
2. As objectively as you can, select which statement best describes the amount of money you spend on this caregiving situation:
  - I spend entirely too much money on this caregiving situation and my finances and financial future are in great danger. I need an intervention to help.
  - I spend more money than I likely should be spending on this caregiving situation and would like to reduce that spend.
  - I think I spend just about the right amount of money on this caregiving situation; I'm satisfied.
  - I should spend more money on this caregiving situation than I do, and I'd like to increase that spend.
  - I spend entirely too little money on this caregiving situation and have a strong desire to spend more.
  
3. Choose the statement below that best characterizes how you think about your employment and your caregiving responsibilities:
  - My caregiving responsibilities have affected 0-5% of my work life.
  - My caregiving responsibilities have affected 5-25% of my work life.
  - My caregiving responsibilities have affected 25-50% of my work life.
  - My caregiving responsibilities have affected 50-75% of my work life.
  - My caregiving responsibilities have affected 75-100% of my work life.
  
4. The degree to which my overall financial/employment condition/health has been negatively affected/disrupted by my role as a caregiver is...

Not at All	Some	Moderately	Quite a Bit	Extremely
------------	------	------------	-------------	-----------

## Health of the Caregiving Landscape

*This section of the checkup explores the health of your “Caregiving Landscape.” The health of the care situation you are managing, including your recipient of care’s health, their housing, and the collaboration of others--as it has a direct impact on your health. The below questions explore areas of that Landscape at a general level.*

**For each question/condition, think about the recipient of care--not yourself as the caregiver:**

1. The physical health, including mobility, of my care recipient is....	Terrible	Poor	Fair	Good	Excellent
2. The mental and emotional health of my care recipient (including their cognitive/thinking abilities) is....	Terrible	Poor	Fair	Good	Excellent
3. The health of my care recipient’s relationships with their family and other social connections is....	Terrible	Poor	Fair	Good	Excellent
4. My care recipient’s sense of identity and purpose is....	Terrible	Poor	Fair	Good	Excellent
5. The financial and legal health of my care recipient is....	Terrible	Poor	Fair	Good	Excellent
6. The condition of my care recipient’s housing and transportation is....	Terrible	Poor	Fair	Good	Excellent
7. The availability, balance, and quality of my care recipient’s external services and outside help is....	Terrible	Poor	Fair	Good	Excellent
8. The degree to which my care recipient’s situation is planned, monitored, and coordinated is....	Terrible	Poor	Fair	Good	Excellent

## DEMOGRAPHICS

*(Optional -- Please fill out all fields that you are comfortable sharing with us; we will use this information to guide course and service creation.)*

- Name: \_\_\_\_\_
- Age: \_\_\_\_\_
- Gender: Male Female Non-Binary Prefer Not to Say
- Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_
- Level of Education: High School Some College Associate's Bachelor's Master's PhD
- Employment: Part-Time Full-Time Self-Employed No Work
- Number of Children: \_\_\_\_\_ Ages: \_\_\_\_\_ Do they live with you? \_\_\_\_\_
- Recipient of Care Gender: Male Female Prefer Not to Say
- Recipient of Care Age: \_\_\_\_\_
- Recipient of Care Relationship -- The recipient of care is my: Mother Father Grandmother Grandfather  
Brother Sister Aunt Uncle Son Daughter Other
- Do you live with the recipient of care? Yes No If Yes: Your Home Other: \_\_\_\_\_

# Caregiver Health, Wellness and Resilience

## Caregiver Complete Check-up



## Caregiver Physical Health

*This section of the checkup explores your physical health, including your diet, exercise, sleep, care for existing conditions, doctor visits, etc.*

1.	I consider the food choices I make overall to be...	Terrible	Poor	Fair	Good	Excellent
2.	I consider the amount of food I consume to be...	Less than I need	Just what I need	More than I need		
3.	In the past week, the degree to which my diet/eating has been negatively affected by my role as a caregiver is...	Not at All	Some	Moderately	Quite a Bit	Extremely
4.	I consider the amount of activity I get each day to be...	Less than I need	Just what I need	More than I need		
5.	I exercise _____ days in an average week.	0	1 - 2	3 - 4	5 - 6	7
6.	In the past week, the degree to which my activity/ exercise has been negatively affected by my role as a caregiver is...	Not at All	Some	Moderately	Quite a Bit	Extremely
7.	I consider my physical flexibility to be....	Terrible	Poor	Fair	Good	Excellent
8.	I consider my weight-management to be...	Terrible	Poor	Fair	Good	Excellent
9.	I consider my mobility (ability to walk and move independently) to be....	Terrible	Poor	Fair	Good	Excellent
10.	Across one week, I average _____ hours of sleep per night.	0 - 2	2 - 4	4 - 6	6 - 8	8+
11.	On an average day, I report my average level of alertness/sleepiness to be...	Very Alert	Alert	Neither	Sleepy	Very Sleepy
12.	In the past week, the degree to which my sleep has been negatively affected by my role as a caregiver is...	Not at All	Some	Moderately	Quite a Bit	Extremely
13.	I take _____ (number) maintenance medications (on a regular basis).	0	1	2	3	4+
14.	My compliance with taking prescribed medication is...	Terrible	Poor	Fair	Good	Excellent / N/A

15. Regarding the treatment of any known diagnosed conditions, my self-care (not considering medication) is...	Terrible	Poor	Fair	Good	Excellent / N/A
16. Throughout an average week, what is the level (include a rating of frequency) of physical pain you experience?	Very Little	Some	Moderate	Quite a Bit	Extreme
17. My contact with physicians and other healthcare/fitness providers who monitor my physical health is...	Less than I need	Just what I need	More than I need		
18. The importance I assign to my physical health is best described as...	Not Important	Somewhat Important	Moderately Important	Quite Important	Extremely Important
19. I consider my overall physical health to be...	Terrible	Poor	Fair	Good	Excellent
20. The degree to which my overall physical health has been negatively affected by my role as a caregiver is...	Not at All	Some	Moderately	Quite a Bit	Extremely
21. My attention to and plan for the future of my physical health is...	Terrible	Poor	Fair	Good	Excellent

## Caregiver Mental and Emotional Health

*This section of the checkup explores your mental and emotional health, including questions that examine stress, guilt, respite, depression, resilience, coping skills, spiritual practices, etc.*

- |  |                         |                       |                         |                         |                        |
|--|-------------------------|-----------------------|-------------------------|-------------------------|------------------------|
| 1. How much time do you take for respite (include any type of personal time for rest (other than nighttime sleep), relief, recovery, recreation, meditation)?  | Less than<br>2 hours/wk | 2-5<br>hours/wk       | 5-10<br>hours/wk        | 10-15<br>hours/wk       | 15+<br>hours/wk        |
| 2. How would you describe your life's current stress level?  | Not at all<br>Stressful | Somewhat<br>Stressful | Moderately<br>Stressful | Quite<br>Stressful      | Extremely<br>Stressful |
| 3. During the past week have you felt completely overwhelmed?  | Yes                     | No                    |                         |                         |                        |
| 4. During the past week have you had a crying spell?   | Yes                     | No                    |                         |                         |                        |
| 5. Describe the level of irritation, anger, or resentment you feel.  | Not at all<br>Angry     | Somewhat              | Moderately              | Quite                   | Extremely<br>Angry     |
| 6. Describe the level of sadness/depression you experience (this includes feelings of hopelessness/worthlessness).   | Not at all<br>Sad       | Somewhat              | Moderately              | Quite                   | Extremely<br>Sad       |
| 7. How much worry/anxiety do you feel for the caregiving situation you are in (including worry/anxiety about the person receiving your care)?  | No/Very<br>Little Worry | Some<br>Worry         | Moderate<br>Worry       | Quite a Bit<br>of Worry | Extreme<br>Worry       |
| 8. How much worry/anxiety do you feel for your life as a whole (not just the caregiving situation you are in)?   | No/Very<br>Little Worry | Some<br>Worry         | Moderate<br>Worry       | Quite a Bit<br>of Worry | Extreme<br>Worry       |
| 9. Select the statement below that best describes the burden/load you feel from your caregiving role.  |                         |                       |                         |                         |                        |
| <ul style="list-style-type: none"> <li>- I feel no or very little burden.</li> <li>- I feel some burden, but it's quite manageable.</li> <li>- I feel a moderate amount of burden, but if I work hard, I can achieve balance.</li> <li>- I feel quite a bit of burden; therefore, other parts of my life are suffering.</li> <li>- I feel extremely burdened; I do not have a minute's break from caregiving responsibilities.</li> </ul>  |                         |                       |                         |                         |                        |
| 10. What level of guilt, if any, do you feel in your caregiving role?  |                         |                       |                         |                         |                        |
| <ul style="list-style-type: none"> <li>- I have no to very little guilt about my caregiving responsibilities.</li> <li>- I feel some guilt, but it doesn't plague me.</li> <li>- I feel a moderate amount of guilt, but I can manage/cope with the feelings to find peace.</li> <li>- I feel quite a bit of guilt; it drives me to work too hard and worry too much.</li> <li>- I feel an extreme amount of guilt, usually every day. It is destroying my feelings of self-worth.</li> </ul> |                         |                       |                         |                         |                        |

11. To what extent do you find meaning, satisfaction and purpose in life because of your caregiving role?
- I find no or very little meaning, satisfaction, and purpose in life because of my caregiving role.
  - I find some meaning, satisfaction, and purpose in life because of my caregiving role.
  - I find moderate meaning, satisfaction, and purpose in life because of my caregiving role.
  - I find quite a bit of meaning, satisfaction, and purpose in life because of my caregiving role.
  - I find an extreme amount of meaning, satisfaction, and purpose in life because of my caregiving role.
12. How has your ability to make decisions and stay focused been negatively affected by your role as a caregiver?
- |  |            |      |            |             |           |
|--|------------|------|------------|-------------|-----------|
|  | Not at All | Some | Moderately | Quite a Bit | Extremely |
|--|------------|------|------------|-------------|-----------|
13. How would you describe your ability and skills to cope and/or manage your thoughts and feelings?
- |  |          |      |      |      |           |
|--|----------|------|------|------|-----------|
|  | Terrible | Poor | Fair | Good | Excellent |
|--|----------|------|------|------|-----------|
14. How much does spirituality/religion contribute to your current situation and life?
- I do not affiliate with/use any spiritual practice/religious tradition.
  - Spiritual/religious practice plays a small role in my life.
  - Spiritual/religious practice plays a moderate role in my life.
  - Spiritual/religious practice plays a significant role in my life.
  - Everything I do is grounded in and filtered through a lens of spiritual/religious practice.
15. My contact with mental/emotional/spiritual-health providers (such as therapists, psychologists and pastors) who monitor my emotional/mental/spiritual health is...
- |  |                  |                  |                  |  |  |
|--|------------------|------------------|------------------|--|--|
|  | Less than I need | Just what I need | More than I need |  |  |
|--|------------------|------------------|------------------|--|--|
16. The importance I assign to my mental/emotional health is best described as:
- |  |               |                    |                      |                 |                     |
|--|---------------|--------------------|----------------------|-----------------|---------------------|
|  | Not Important | Somewhat Important | Moderately Important | Quite Important | Extremely Important |
|--|---------------|--------------------|----------------------|-----------------|---------------------|
17. I consider my overall mental/emotional health to be...
- |  |          |      |      |      |           |
|--|----------|------|------|------|-----------|
|  | Terrible | Poor | Fair | Good | Excellent |
|--|----------|------|------|------|-----------|
18. The degree to which my overall mental/emotional health has been negatively affected/disrupted by my role as a caregiver is...
- |  |            |      |            |             |           |
|--|------------|------|------------|-------------|-----------|
|  | Not at All | Some | Moderately | Quite a Bit | Extremely |
|--|------------|------|------------|-------------|-----------|
19. My attention to and plan for the future of my mental/emotional health is...
- |  |          |      |      |      |           |
|--|----------|------|------|------|-----------|
|  | Terrible | Poor | Fair | Good | Excellent |
|--|----------|------|------|------|-----------|

## Caregiver Social and Family Health

*This section of the checklist explores the health of your social interactions and family relationships.*

1. How would you describe your level of loneliness/isolation in your caregiving role?

Not at all Lonely	Somewhat	Moderately	Quite	Extremely Lonely
----------------------	----------	------------	-------	---------------------
  
2. Describe your relationship with the recipient of your care.
  - Terrible--We constantly fight and bitterly disagree about decisions and issues.
  - Poor--We are not close, we disagree, but it is not constant/bitter.
  - Fair--We make it work, but it's neither warm nor cold.
  - Good--We are mostly aligned and work well together, but it's not overly warm.
  - Excellent--The relationship is incredibly warm and loving, we are almost always aligned.
  
3. Realizing that individual relationships can vary widely, what is the "average level" relationship you have with other family members who are directly engaged in the caregiving situation.
  - Terrible--We constantly fight and bitterly disagree about decisions and issues.
  - Poor--We are not close, we disagree, but it is not constant/bitter.
  - Fair--We make it work, but it's neither warm nor cold.
  - Good--We are mostly aligned and work well together, but it's not overly warm.
  - Excellent--The relationship is incredibly warm and loving, we are almost always aligned.
  - N/A - No other family members are directly engaged in this caregiving situation.
  
4. What is the "average level" relationship you have with family members who are not directly engaged in the caregiving situation.
  - Terrible--We constantly fight and bitterly disagree about decisions and issues.
  - Poor--We are not close, we disagree, but it is not constant/bitter.
  - Fair--We make it work, but it's neither warm nor cold.
  - Good--We are mostly aligned and work well together, but it's not overly warm.
  - Excellent--The relationship is incredibly warm and loving, we are almost always aligned.
  - N/A - No other family members are directly engaged in this caregiving situation.
  
5. What is the quality of your current relationship with your significant other/spouse/partner.
  - Terrible--We constantly fight and bitterly disagree about decisions and issues.
  - Poor--We are not close, we disagree, but it is not constant/bitter.
  - Fair--We make it work, but it's neither warm nor cold.
  - Good--We are mostly aligned and work well together, but it's not overly warm.
  - Excellent--The relationship is incredibly warm and loving, we are almost always aligned.
  - N/A - No significant other/spouse/partner.

6. If you have children, what is your “average level” of relationship with them as a group?

- Terrible--We constantly fight and bitterly disagree about decisions and issues.
- Poor--We are not close, we disagree, but it is not constant / bitter.
- Fair--We make it work, but it's neither warm nor cold.
- Good--We are mostly aligned and work well together, but it's not overly warm.
- Excellent--The relationship is incredibly warm and loving, we are almost always aligned.
- N/A - No children.

7. If you work, part-time or full-time, what is your level of social interaction with work colleagues?

- No - Very little social engagement
- Some social engagement
- Moderate social engagement
- Quite a bit of social engagement
- Extreme amount of social engagement
- N/A - I do not work nor do I have work colleagues

8. Consider other communities/groups you are part of (religious, neighborhood, dinner groups, community causes, etc.), What is your level of social interaction with these communities?

- No - Very little social engagement
- Some social engagement
- Moderate social engagement
- Quite a bit of social engagement
- Extreme amount of social engagement
- N/A - I do not have relationships with any of these kinds of groups

9. Considering your total level of social interactions across all groups, what amount of social interaction do you have?	Less than I need	Just what I need	More than I need		
10. The importance I assign to my social and family health is best described as...	Not Important	Somewhat Important	Moderately Important	Quite Important	Extremely Important
11. I consider my overall social interactions/health to be...	Terrible	Poor	Fair	Good	Excellent
12. The degree to which my overall social interactions/health has been negatively affected/disrupted by my role as a caregiver is...	Not at All	Some	Moderately	Quite a Bit	Extremely
13. My attention to and plan for the future of my social interactions/health is...	Terrible	Poor	Fair	Good	Excellent

## Caregiver Financial and Employment Health

*This section of the checkup explores your financial/employment health, including how much time is spent in your caregiving role.*

1. What is the average number of **hours per day** you spend fulfilling caregiving responsibilities? \_\_\_\_\_
  
2. What is the average number of **hours per week** you spend fulfilling caregiving responsibilities? \_\_\_\_\_
  
3. As objectively as you can, select which statement best describes the amount of time you spend as a caregiver:
  - I spend entirely too much time as a caregiver and my life is out of control because of it.
  - I spend more time than I likely need to spend as a caregiver and would like to reduce those hours.
  - I think I spend just about the right amount of time as a caregiver--it's in balance and I am satisfied.
  - I should spend more time than I do as a caregiver and would like to increase those hours.
  - I spend entirely too little time as a caregiver--and have a strong desire to spend more time.
  
4. What is the average amount of money you spend per week because of your caregiving responsibilities? \$\_\_\_\_\_
  
5. As objectively as you can, select which statement best describes the amount of money you spend on this caregiving situation:
  - I spend entirely too much money on this caregiving situation and my finances and financial future are in great danger. I need an intervention to help.
  - I spend more money than I likely should be spending on this caregiving situation and would like to reduce that spend.
  - I think I spend just about the right amount of money on this caregiving situation; I'm satisfied.
  - I should spend more money on this caregiving situation than I do, and I'd like to increase that spend.
  - I spend entirely too little money on this caregiving situation and have a strong desire to spend more.
  
6. Choose the statement below that best characterizes how you think about your employment and your caregiving responsibilities: (Consider modifications to your employment environment / location, hours worked, decisions made about promotions, job changes, etc.)
  - I have made a few modifications to my employment because of my caregiving, but nothing drastic--my caregiving situation has affected 5-20% of my work life.
  - I have made several changes to my employment situation--a few significant changes, because of my role as a caregiver. My caregiving situation has affected 25-50% of my work life.
  - I have made a lot of modifications to my employment situation (affecting 50-75% of my work life) because of my caregiving responsibilities. I've chosen different hours, different positions, and different jobs--often at a sacrifice, to accommodate my caregiving responsibilities.
  - Everything about my employment situation would be different if it were not for my caregiving responsibilities--I have made tremendous sacrifices and tradeoffs to accommodate my caregiving (affecting 75-100% of my work life). I would work different hours, may not have quit/modified my job, perhaps would work in a different industry with a different company, work in a different city--the trajectory of my career would look very different.

7. How willing are you to/comfortable are you in talk(ing) with your employer about your caregiving situation?

Not at all willing/  
comfortable

Somewhat

Moderately

Quite

Extremely willing/  
comfortable  
N/A - No employer

8. Which of the following people at work have you told about your caregiving situation?

Select all that apply:

- N/A: I do not work
- My immediate supervisor
- My direct reports
- Human resources
- Other management
- Other co-workers
- I have not told anyone at work about my caregiving situation

9. How supportive is your employer of your caregiving responsibilities?

- N/A: I do not have an employer
- Not at all
- Somewhat
- Moderately
- Quite
- Extremely

10. What kinds of programs / accommodations does your employer provide for your caregiving role/situation?

Select all that apply:

- N/A - I am not employed
- None
- Leave of Absence program
- FMLA (Family Medical Leave Act)
- Telecommuting or flexible working/flextime accommodations
- Caregiving resources (online, helpline, specific counseling)
- Employee wellness programs
- Employee assistance/education programs (EAP)
- Mental health / counseling services
- Other: \_\_\_\_\_

11. Have you experienced adverse employment action as a result of your caregiving duties?

- Yes; Describe the adverse action: \_\_\_\_\_
- No
- Uncertain
- N/A-I am not employed / this question does not apply.

12. The degree to which my overall financial/employment condition/health has been negatively affected/disrupted by my role as a caregiver is...	Not at All	Some	Moderately	Quite a Bit	Extremely
13. My attention to and plan for the future of my financial/employment condition/health is...	Terrible	Poor	Fair	Good	Excellent

## Health of the Caregiving Landscape

*This section of the checkup explores the health of your “Caregiving Landscape.” The health of the care situation you are managing, including your recipient of care’s health, their housing, and the collaboration of others--as it has a direct impact on your health. The below questions explore areas of that Landscape at a general level.*

**For each question/condition, think about the recipient of care--not yourself as the caregiver:**

1. The physical health, including mobility, of my care recipient is....	Terrible	Poor	Fair	Good	Excellent
2. The mental and emotional health of my care recipient (including their cognitive/thinking abilities) is....	Terrible	Poor	Fair	Good	Excellent
3. The health of my care recipient’s relationships with their family and other social connections is....	Terrible	Poor	Fair	Good	Excellent
4. My care recipient’s sense of identity and purpose is....	Terrible	Poor	Fair	Good	Excellent
5. The financial and legal health of my care recipient is....	Terrible	Poor	Fair	Good	Excellent
6. The condition of my care recipient’s housing and transportation is....	Terrible	Poor	Fair	Good	Excellent
7. The availability, balance, and quality of my care recipient’s external services and outside help is....	Terrible	Poor	Fair	Good	Excellent
8. The degree to which my care recipient’s situation is planned, monitored, and coordinated is....	Terrible	Poor	Fair	Good	Excellent

## DEMOGRAPHICS

*(Optional -- Please fill out all fields that you are comfortable sharing with us; we will use this information to guide course and service creation.)*

- Name: \_\_\_\_\_
- Age: \_\_\_\_\_
- Gender: Male Female Non-Binary Prefer Not to Say
- Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_
- Level of Education: High School Some College Associate's Bachelor's Master's PhD
- Employment: Part-Time Full-Time Self-Employed No Work
- Number of Children: \_\_\_\_\_ Ages: \_\_\_\_\_ Do they live with you? \_\_\_\_\_
- Recipient of Care Gender: Male Female Prefer Not to Say
- Recipient of Care Age: \_\_\_\_\_
- Recipient of Care Relationship -- The recipient of care is my: Mother Father Grandmother Grandfather  
Brother Sister Aunt Uncle Son Daughter Other
- Do you live with the recipient of care? Yes No If Yes: Your Home Other: \_\_\_\_\_