



## Have a Family Meeting *Before* a Crisis Situation

### FAMILY CAREGIVER SUPPORT NETWORK

FOR FAMILY MEMBERS AND FRIENDS WHO HELP OR CARE FOR OLDER ADULTS

**Why have a family meeting?** Too often a family meeting is delayed until the older adult has a health or housing relocation crisis. They are frequently held informally through discussion during the holidays or at special family events. However, when family meetings are held because of a crisis or during informal activities, discussion can be fragmented and often not everyone involved is consulted.

It is common for family members to have misconceived or pre-existing ideas regarding the physical and mental capabilities of the older adult. Family members also may be confused about exactly what their caregiving role is going to be. This is why having a family meeting is so important; and why doing so before a crisis situation can help avoid the heightened emotions brought on by stressful circumstances.

**Ideally**, in a situation of aging parents and adult children, the parents should openly discuss their caregiving expectations with their children. The adult children need to define their limitations as to how much caregiving they are willing to do. All immediate family members should be present in a non-crisis situation.

A good way to bring up the topic of caregiving is to get all close family members and friends, age 18 and older, together to fill out their Power of Attorney for Health Care forms, appoint health care representatives and discuss care preferences. The forms, which are free, can help stimulate discussion about the older adults' care and housing preferences. They can be found at <http://www.dhs.wisconsin.gov/forms/advdirectives>.

**Is a family meeting always needed?** Some families who frequently communicate by telephone or face-to-face and understand the need to "share" caregiving functions may not need a family meeting. However, this scenario is rare. A family meeting can still be a nice way to check on whether or not everyone feels they are being treated fairly or kept in the communication loop.

**How do you hold a "family meeting?"** The meeting should be kept as small as possible, only attended by those individuals who will have direct decision-making or care involvement. If the older adult is mentally competent, he or she needs to be involved in all decisions about his or her own care and attend all family meetings.

A basic agenda should be developed to keep the meeting on track. Before the meeting everyone should be able to give their input on the topics for discussion and no one's ideas should be discounted. The outline can change and develop with future meetings and as care needs change. For ideas on important topics to include and discuss see the Family Caregiver Support Network's handout entitled "Family Planning is Important". This handout may be obtained by calling **(414) 220-8600**.

If disputes are expected, the first meeting can be about setting ground rules about behavior, understanding what are convenient times for meetings and goals for meetings. If relationships are strained, a neutral third party such as a social worker or geriatric care manager trained in offering family meetings may be a good person to have at meetings.

If the only time all family members can get together is during the holidays, schedule a special time, possibly the day after the holiday, for a family meeting. Then whenever discussion about caregiving is brought up, there can be a reminder that it will be discussed “tomorrow.” Everyone can then enjoy the holidays and complete attention can be given to discussing caregiving concerns during the meeting.

## Family Meeting Checklist

- 1.) Invite everyone, including the older adult, who has an interest but keep the meeting as small as possible. Limit attendance to those people who have direct contact with the aging loved one. If this is a planning meeting and not an older adult care or relocation crisis, set the guidelines for future meetings – frequency, respect while talking, length of talking, place for meetings and goals for meetings, etc. The older adult can discuss his or her preferences for immediate or future care and housing.
  - Also, Advanced Directives known as Powers of Attorney for Health Care and for Finance, when completed, can help give direction when delegating duties and choosing roles.
- 2.) Everyone in the meeting should be encouraged to participate so that no one can later say, “I didn’t get to talk.”
- 3.) Listen “generously.” Remember that there is usually more than one way to solve a crisis or situation.
- 4.) Take notes so that things can be sorted out later and ideas can be written down if more thought is needed.
- 5.) Obtain the help of an objective outside party if needed. Many social workers and geriatric care managers are trained to help families negotiate sensitive issues with a goal of having the best possible outcome.
- 6.) If anger crops up, suggest a break so folks can “cool off” and hopefully come back to the table a little more willing to work through the challenges.
- 7.) Be willing to compromise. Rarely does anyone get to have his or her way all the time and on every point.
- 8.) Agree to disagree without being “disagreeable” if at all possible! Common courtesy and civility does matter in keeping things positive in family discussions.
- 9.) Have more than one meeting if needed and if appropriate so that ideas can be explored, phone calls made and new facts presented before a final decision is made.
- 10.) End the meeting by affirming the following:
  - What was decided?
  - What is left to be decided?
  - Who is going to do what before the next meeting?
  - Setting up a time for the next meeting if needed

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