



# Guide for Professionals

June 2022

**Contents**

Welcome to Our Family, Our Way ..... 4

The Family Meeting Materials ..... 5

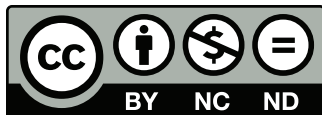
Other Materials Available On The OFOW Website ..... 6

Guide Design ..... 8

How Should Families Use OFOW? ..... 9

How to Support Caregiving Families Using OFOW ..... 10

Our Family, Our Way: A Communication and Care Coordination Guide for Caregiving Families  
Created by Scripps Gerontology Center, Miami University  
with support from The Retirement Research Foundation  
and The Ohio Long-Term Care Research Project



Heston-Mullins, J., McGrew, K. B., & Helsinger, A. (2021).  
This work is licensed under the Creative Commons Attribution-  
NonCommercial-NoDerivatives 4.0 International License. Based on  
a work at [www.MiamiOH.edu/ScrippsAging/OFOW](http://www.MiamiOH.edu/ScrippsAging/OFOW). To view a copy  
of this license, visit <http://creativecommons.org/licenses/by-nc-nd/4.0/>

For information about Our Family, Our Way, contact:

Jennifer Heston-Mullins, PhD, LISW  
Scripps Gerontology Center  
Miami University  
396 Upham Hall  
Oxford, Ohio 45056



## Welcome to Our Family, Our Way

The goal of Our Family, Our Way (OFOW) is to **help caregiving families arrive at the best possible care and support arrangement** when someone needs help at home.

### Family

By **family** we mean a person who needs care, their spouse or partner, adult children (including step-children and children-in-law) and other closely-involved family members or friends—no matter where they live.

### Care and support

By **care** we mean direct help with daily living such as bathing, dressing, meal preparation, transportation and the like. By **support**, we mean indirect help such as home modifications, information gathering, and financial or other resources.

### Care and support arrangement

The care and support **arrangement** is the combination of *who* does *what*, *when*, *where*, and *how* in terms of care and support.

### Best possible

By **best possible** care and support arrangement we mean an arrangement that takes everyone's needs, strengths, preferences, and limitations into account as a family makes decisions about the arrangement. The best possible arrangement is well-communicated and achieves the best possible outcomes for everyone involved.

### Care Partner vs. Caregiver

Throughout the OFOW materials, we use the term **care partner**, rather than caregiver, to refer to family, friends, and others who provide care and support. We feel this language helps us all remember that persons with care needs should be considered active participants - partners - in their own care and support and not just passive "receivers."

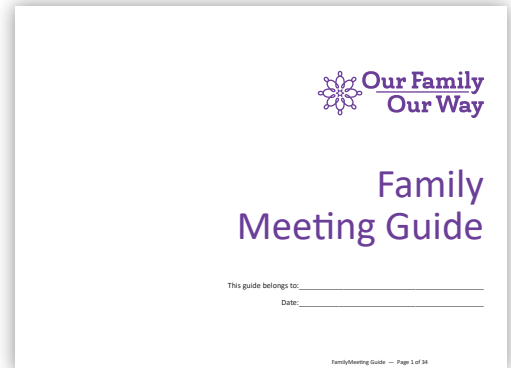
# The Family Meeting Materials

The Our Family, Our Way (OFOW) family meeting materials consist of 3 main documents:



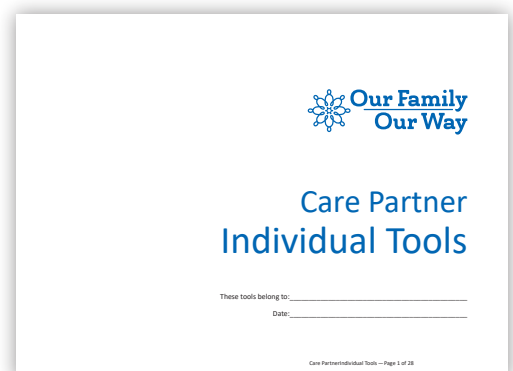
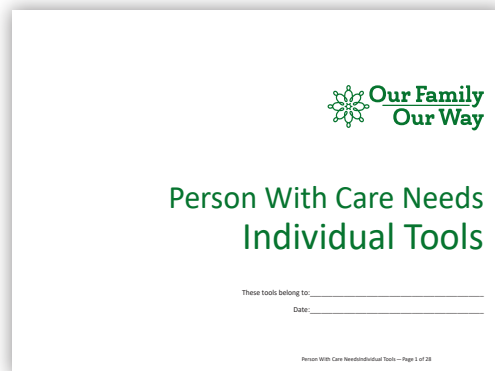
## Family Meeting Guide

The Family Meeting Guide walks the family through their meeting. Each member of the family who will be participating in the family meeting should get a copy of the Family Meeting Guide in advance of the meeting.



## Individual Tools

There are two versions of the Individual Tools – one for the person with care needs (PWCN) and one for care partners. Both versions contain the same information but with slightly different wording. Before the family meeting, each participating family member completes the version that is appropriate for them.



## Family Meeting Record

At the family meeting, the family will need one copy of the Family Meeting Record to document their agreements and plans.



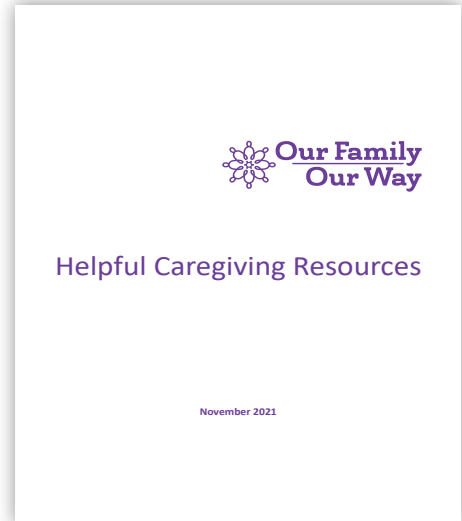
## Other Materials Available On The OFOW Website

The OFOW website contains other materials for caregiving families that can also be downloaded and printed free of charge:



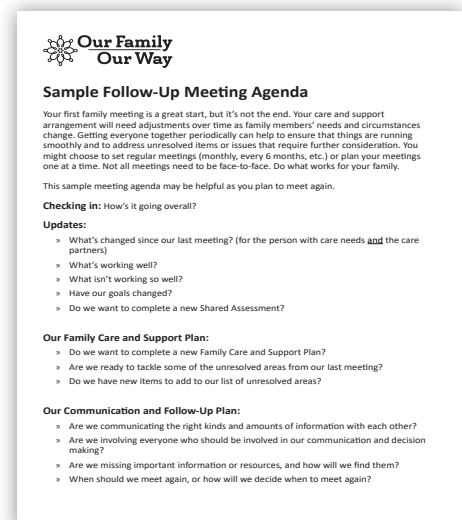
### Helpful Caregiving Resources

This booklet is designed to assist families in locating resources that may be helpful to them as they plan and revise their care and support arrangement.



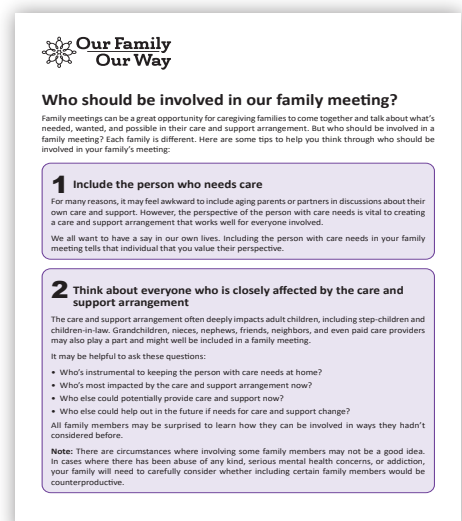
### Sample Follow-Up Meeting Agenda

This agenda is an outline that families can use for continued discussions about their care and support arrangement.



### Tip Sheets


The OFOW website contains several tip sheets to help families think through various topics about a family meeting such as who should be involved, how to prepare, general communication tips, and what to do if major differences occur. A tip sheet is also available that provides guidance on how family members who live at a distance from the person with care needs can provide meaningful support.





## All About Me

This resource is designed to help care partners get to know what’s most important to the person with care needs and their preferences for certain aspects of care and support. Not only can this information be helpful in guiding family and friend care partners, but it can also be useful to paid care partners who may be part of the arrangement.

 **Our Family Our Way**

**All About Me**  
Family members and friends may know each other well, but there are some questions that we typically don’t ask each other. This resource is designed to help care partners get to know what’s most important to the person with care needs and their preferences for certain aspects of care and support. Not only can this information be helpful in guiding family and friend care partners, but it can also be useful to paid care partners who may be part of your arrangement.

This resource is divided into two parts – The Big Picture and Daily Routine. Some people may be able to provide general insights about themselves, and others may be able to provide specific details about their preferences. Depending on what an individual is able to communicate, use the questions in each section to ensure the voice of the person with care needs is included in shaping the care and support arrangement.

**The Big Picture**

If you were meeting someone for the first time, what’s the most important thing they should know about you?


**What are your favorite things to do?**

**How do you like to spend your time?**  
Do you have any hobbies?



## Engagement Calendar

This resource is designed to record engagement for the person with care needs and/or the primary care partner(s) to help families see the “gaps” where more engagement might be needed to help ensure that the person with care needs and/or the primary care partner is staying connected.

 **Our Family Our Way** Engagement Calendar

Regardless of whether someone lives close or far away, “engagement” can come in many forms: telephone calls, emails, visits (in-person or virtual), family or friend gatherings, sharing meals, and sending cards or flowers. It could also include outings such as restaurants, worship services, meetings for social clubs or civic groups, and other events. Completing this calendar should involve a conversation with the person with care needs and the primary care partner to help families include engagement opportunities that preserve their interests. Review this document from time-to-time as interests and schedules change.

Use this calendar to record engagement that happens routinely (daily, weekly, and monthly). This will help you see the “gaps” where more engagement might be needed to help ensure that the person with care needs and/or the primary care partner is staying connected.

	Morning	Afternoon	Evening
MONDAY			
TUESDAY			
WEDNESDAY			
THURSDAY			
FRIDAY			
SATURDAY			
SUNDAY			

## Guide Design

Our Family, Our Way is designed as a self-guided process that does not require the involvement of a professional, however, any professional is welcome to use the OFOW materials and process in their work with caregiving families. There are four stages in the process: thinking about who should be included in the family meeting, accessing and preparing the materials, completing the Individual Tools, and holding a family meeting.



### **Thinking about who should be included in the family meeting**

Include everyone who is closely affected by the care and support arrangement. In addition to the person with care needs (PWCN), the care and support arrangement often deeply impacts adult children (including step-children and children-in-law). Siblings, grandchildren, nieces, nephews, friends, neighbors, and even paid care providers may also play a part and might be included in a family meeting. There are two tip sheets on the Our OFOW website that might be useful in this stage: *Who should be involved in our family meeting?* and *Should we include the person with care needs in our family meeting?*



### **Accessing and preparing the materials**

All the materials needed for this process can be downloaded for free from the OFOW website. After the materials are downloaded, they can either be printed and completed on paper or saved and completed electronically. The OFOW website provides instructions for how to download, print, assemble, and navigate the materials in the *Preparing Your Family Meeting Materials* document.



### **Completing the Individual Tools**

Each family member completes their set of Individual Tools ahead of the family meeting.

The Individual Tools provide a way for each family member, including the PWCN, to think about what's needed, what's happening now, what's wanted, and what's possible in terms of the care and support arrangement. Taking the time to reflect on their own perceptions of their family's care and support arrangement, and how it affects them, will help prepare the family to have open, honest discussion in their meeting.



### **Holding a family meeting**

Using the Our Family, Our Way guidelines, the family holds a meeting.

At the meeting, the family members will discuss their completed Individual Tools with each other. By completing a Shared Assessment, they will identify where they see eye-to-eye, and where more conversation is needed. Then, they'll create a shared goal statement and a Family Care and Support Plan. Finally, they'll decide on a follow-up plan for resolving remaining differences and unfinished business, and for ongoing communication and care coordination.



## How Should Families Use OFOW?

Not every family should use OFOW as a self-guided resource. All families are different. Some families are better problem solvers than others. Some families have relatively uncomplicated relationships and others have more complicated relationships. Some families have a high tolerance for differences of opinion and some have very little tolerance. Some families openly communicate and others are more closed or guarded with each other. We've provided some information below to help you decide whether a family should use OFOW independently, or if they may benefit more from professional involvement in the process.

**Does the family express a desire for better communication or for changes in the care and support arrangement?** If the family (or most members of the family) are committed to achieving the best possible care and support arrangement and are ready to have open and honest conversation, a self-guided process such as OFOW may be just right for them. Some families may not think they need help communicating about care and support, but even those who felt they had good communication have been surprised by how much they learned and grew through the OFOW process.

**Who's willing to participate?** The full OFOW family meeting process requires willing participation from two or more family members. We recommend that the PWCN be actively involved in the process. However, there are times when including the PWCN is not possible or feasible. In those circumstances, care partners could utilize OFOW on their own. We provide resources to guide families in determining whether they should include the person with care needs in the family meeting and for how to capture the "voice" of the PWCN to help guide their discussions about care and support if the person with care needs is not present. If only one family member is interested in holding a family meeting or trying to make changes to the care and support arrangement, a self-guided process is not recommended. However, that individual may still benefit from utilizing some of the OFOW website resources to share with their family members.

**Does the family have a history of serious conflict, communication difficulties, or trauma?** These are families who need more help communicating than a self-guided process can provide. You might worry that, without a professional involved, the family cannot handle the "can of worms" that topics of care and support might open. The last thing anyone wants is to create hurtful and counterproductive conflict that is not easily resolved. Even though a self-guided process may not be right for such a family, they may still be able to use the OFOW process and materials with involvement from a professional such as a family counselor, mediator, or care manager. In this guide we provide suggestions for how professionals can utilize OFOW in their work with families.

## How to Support Caregiving Families Using OFOW

Depending on the type of family with which you are working, there are different ways of interacting with the OFOW process and materials to provide support for caregiving families.

### ALL families

Notify them about the availability of OFOW and direct them to the OFOW website at [www.MiamiOH.edu/ScrippsAging/ofow](http://www.MiamiOH.edu/ScrippsAging/ofow)

There are resources available in the **Materials for Professionals** section of the website which can be downloaded, printed, or shared electronically through newsletters, listservs, and social media.

- » [\*\*OFOW Half Flyer\*\*](#) [8.5x11 PDF with two half-sheet flyers]
- » [\*\*OFOW Full Flyer\*\*](#) [8.5x11 full-page PDF]
- » [\*\*OFOW Square Social Media Graphic.jpg\*\*](#) [suitable for Facebook]
- » [\*\*OFOW Twitter Social Media Graphic.jpg\*\*](#)

### Families who are skeptical about the helpfulness or usefulness of holding a family meeting or are not sure how to get started

Direct them to these videos and tip sheets on the OFOW website:

- » [\*\*What can a family meeting do for us?\*\*](#) [video]
- » [\*\*How do we hold a family meeting?\*\*](#) [video]
- » [\*\*Who should be included in our family meeting?\*\*](#) [tip sheet]
- » [\*\*Should we include the person with care needs in our family meeting?\*\*](#) [tip sheet]

### Families who do not have access to a computer, wifi, and/or printer

The OFOW materials are freely available for download and printing from the OFOW website. If you or your organization chooses to print and download materials for families, please note that under the OFOW Creative Commons licensing, you may recoup printing and binding costs, but the OFOW materials may not be used for any commercial purposes, and no family should be charged for access to the materials or to use them.

## Families who need coaching to stay accountable

Some families may be eager and willing to use the OFOW process and materials, and are technically able to use OFOW as a self-guided resource, but may need someone to help them stay accountable to the process. After a family has decided to utilize OFOW, professionals can use the four stages of the OFOW process to coach families along the way and remind them of next steps. This coaching can occur via telephone or video platform.

Four Stages of the OFOW Process		
Stage 1	Coaching Activity	OFOW Resources
<p><b>Thinking about who should be included in the family meeting</b></p>	<p>Identify a primary contact within the family who will be the point person for communication with other family members.</p> <p>Ask the primary contact to identify who is closely affected by the care and support arrangement, and encourage them to invite those individuals (including thePWCN) to participate in the process.</p> <p>Discuss any issues or concerns about including the PWCN in the meeting.</p> <p>Work with primary contact to schedule a date for the family meeting, allowing adequate time for family members to complete and share their individual tools prior to the meeting.</p>	<p><b><u>Who should be included in our family meeting?</u></b> [tip sheet]</p> <p><b><u>Should we include the person with care needs in our family meeting?</u></b> [tip sheet]</p>

## Four Stages of the OFOW Process

Stage 2	Coaching Activity	OFOW Resources
<p><b>Accessing and preparing the materials</b></p>	<p>Work with primary contact to ensure that all participating family members have access to the OFOW website and/or printed materials.</p> <p>Discuss with primary contact whether family members will complete the Individual Tools and Family Meeting Record electronically using fillable PDFs or whether they will download and print the PDFs to complete them.</p> <p>Determine and discuss any technical support, equipment, or supply needs the family requires in order to utilize the OFOW website and/or materials.</p>	<p><b><u><i>Preparing Your Family Meeting Materials</i></u></b> [PDF]</p> <p><b><u><i>How to Access, Download, and Print Family Meeting Materials</i></u></b> [video]</p> <p><b><u><i>Our Family Our Way Binder Cover</i></u></b> [PDF]</p>

## Four Stages of the OFOW Process

Stage 3	Coaching Activity	OFOW Resources
<p><b>Completing and exchanging the individual tools</b></p>	<p>Confirm with primary contact that all participating members can successfully access, or have been provided with, the appropriate version of the Individual Tools.</p> <p>Determine if the PWCN is able to complete the full version of the Individual Tools or if the <b>All About Me</b> resource should be utilized.</p> <p><i>*Note - PWCNs who are able to complete the full Individual Tools may also want to use the <b>All About Me</b> document to provide their family members with more detailed information about their preferences.</i></p> <p>Determine the timeline in which the family members will complete their Individual Tools.</p> <p>Determine how the family will share their Individual Tools with each other (scan, email, postal mail, etc.). We recommend they share their tools with each other prior to the meeting, but if that is not possible, they can share at the beginning of the family meeting.</p>	<p><b><u>Preparing for your family meeting</u></b> [tip sheet]</p> <p><b><u>Person with Care Needs Individual Tools</u></b> [fillable PDF]</p> <p><b><u>Care Partner Individual Tools</u></b> [fillable PDF]</p> <p><b><u>All About Me</u></b> [fillable PDF]</p>

## Four Stages of the OFOW Process

Stage 4	Coaching Activity	OFOW Resource
<p><b>Holding a family meeting</b></p>	<p>Check in with the primary contact prior to the scheduled date of the family meeting to confirm meeting time, place, and participating family members.</p> <p>Ensure the primary contact or another family member has a copy of the <b>Family Meeting Record</b> on hand for the meeting</p> <p>Encourage use of the <b>Engagement Calendar</b> during the meeting to address social engagement and connection for the PWCN and the primary care partner(s).</p> <p>Discuss how the completed <b>Family Meeting Record</b> will be distributed to each participating family member after the meeting.</p> <p>Schedule a check-in with the primary contact after the family meeting to debrief and discuss next steps, including the family’s plan for revisiting their care and support arrangement in the future.</p> <p>Encourage use of the <b>Sample Follow-up Meeting Agenda</b> or the full set of family meeting materials for future meetings.</p> <p>Encourage the family to provide feedback about their experience on the OFOW website.</p>	<p><b><u>Family Meeting Guide</u></b> [PDF]</p> <p><b><u>Family Meeting Record</u></b> [fillable PDF]</p> <p><b><u>General communication tips for your family meeting</u></b> [tip sheet]</p> <p><b><u>How can I provide meaningful support from a distance?</u></b> [tip sheet]</p> <p><b><u>Engagement Calendar</u></b> [fillable PDF]</p> <p><b><u>How do we deal with major differences in our family meeting?</u></b> [tip sheet]</p> <p><b><u>Sample Follow-up Meeting Agenda</u></b> [PDF]</p>

## Families who need facilitation during their family meeting

Some families require active involvement from a professional in order to have productive and affirming discussions about care and support - especially families with a history of poor communication, serious conflict, or trauma. With these families, consider playing a more active role in the process by coaching the family through the four stages of OFOW as described in the previous section and being present for their family meeting.

During the family meeting, you can facilitate effective communication by utilizing the **Family Meeting Guide** and **Family Meeting Record** and serving in the role of Reader or Recorder. By walking through the family meeting with the participating members, you can address conflict or sensitive topics as they arise and ensure a safe space for family members to share with each other.

The **Family Meeting Guide** and **Family Meeting Record** will walk you and the participating family members through the process of conducting a Shared Assessment and developing a shared goal statement, a Family Care and Support Plan, and a back-up plan. The process will also identify where other family members and community services might be able to fill in care gaps. There is no prescription as to how long a family meeting should take. There are breaks built in between each step of the family meeting to help pace the meeting and allow time for the family to regroup at a later date if needed.

## Providing Feedback to the OFOW Team

We hope that you find OFOW helpful in your work with caregiving families. Please consider providing the OFOW development team some feedback about your experience with OFOW to help us further improve the process and materials.

You can do this by visiting the OFOW website at [www.MiamiOH.edu/ScrippsAging/ofow](http://www.MiamiOH.edu/ScrippsAging/ofow) and completing the brief online survey for professionals.

Please also encourage families who have utilized OFOW to share their experiences through the online survey for family members and friends.