



Powerful Tools for Caregivers Toolkit for Success

An implementation guide for Program Providers and
leaders to start or enhance your Powerful Tools for
Caregivers[®] Program

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This implementation guide presents best practices and successful strategies gleaned from telephone interviews conducted over a three-month period during late 2014 with agencies across Wisconsin and in other states. Its purpose is to assist communities in implementing a *Powerful Tools for Caregivers (PTC)* program or strengthening an existing program.

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I. Why Support for Caregivers is Important

Care provided by informal or unpaid caregivers represents the majority of care provided to adults in the United States. Current reports estimate that there are over 66 million people caring for a family member. Given the aging population, many people are now, or soon will be, providing care to a family member or friend. Family caregivers are a huge and critical component of the long-term care system. These unpaid caregivers provide care to family members, often enabling them to live at home, thereby delaying or preventing nursing home admissions. Thus, saving money on institutionalized care both for families and taxpayers. Even when family members are in facilities, family caregivers spend time, energy, and resources caring for a loved one. According to a 2019 AARP Public Policy Institute report, the value of family caregiving in the U.S. is worth \$470 billion per yearⁱ.

Studies have shown that caregivers face increased health risks associated with caregiving. Depression, anxiety, social isolation, and physical symptoms are the most common consequences. The severity differs based on the level and length of caregiving, gender, relationship, and cultural factors. Financially, caregiving takes a toll as well. Often a caregiver reduces hours, leaves employment, or retires earlier to provide care to a loved one. This results in lost wages, and smaller benefits, with a more severe effect on women. According to a 2011 MetLife study, the total financial loss to employed caregivers including loss of wages, time, social security, and pension is estimated to be about \$3 trillionⁱⁱ.

Interventions for caregivers range from support groups to caregiver education. These interventions can empower caregivers by providing them with skills needed to sustain their caregiving role. Thereby reducing health risks of caregivers and delaying or entirely preventing institutionalization of care recipients. Psychoeducational programs for caregivers are important to help caregivers learn and practice good self-care so they can both continue to provide care to their care receiver and maintain their own health and well-being. There are a variety of interventions that offer support, education, and skill development for caregivers. One of those interventions is *Powerful Tools for Caregivers (PTC)*.

For the above reasons, it is important for Wisconsin counties to provide a robust offering of programming for caregivers. Education, support groups, special caregiver events, respite, and resource directories are examples of services needed to build a successful, complete caregiver program. Caregiver education generally reaches many more caregivers than does direct care services. *PTC* can also be an important part of a community's support for caregivers. Its scientific base and proven outcomes, which include strengthening a caregiver's confidence and abilities to manage caregiving, make it a critical component of a community's offerings.

II. *Powerful Tools for Caregivers: An Evidence-Based Program for Family Caregivers*

Powerful Tools for Caregivers (PTC) is an evidence-based health promotion program, recognized as “high-level” by the U.S. Administration on Community Living. “Evidence-based” means the curriculum has been scientifically researched and proven to have statistically significant results for participants. Proven positive outcomes show that caregivers who have completed the program have:

- Greater self-efficacy (confidence in one’s ability to accomplish a self-identified goal)
- Better emotional well-being
- Increased use of self-care behaviors
- Increased awareness and use of community resources.ⁱⁱⁱ

PTC is a community workshop, with two curriculums. The original, *Powerful Tools for Caregivers*, is a six week session that meets for either 2.5 or 1.5 hours each week. The shorter version, which is often more convenient for evening classes for working caregivers, covers the same curriculum but has fewer participant interactive components. The shorter version may also be used to offer the program virtually. There is also an adaptation of the program, *Powerful Tools for Caregivers: For Parents of Children with Special Needs*. This version follows a similar format but meets for 2 hours each week. All formats have shown the same positive results for participants.

PTC is based on the Stanford Chronic Disease Self-Management Program (called “*Living Well with Chronic Conditions*” in Wisconsin). *PTC* was developed in Oregon by Legacy Health Systems and transitioned to Iowa State University in 2021. In Wisconsin, the program was first overseen by the University of Wisconsin-Extension. In 2009 Bethany Homes in Waupaca, WI assumed responsibility for the program. The Wisconsin Institute for Healthy Aging (WIHA) took over responsibility for program administration in 2013. Thousands of caregivers across the U.S. and Wisconsin have participated in the program since 2000.

WIHA’s program administration includes: organizing Leader Trainings; preparing leader recruitment materials; selecting individuals for the Leader Trainings; maintaining databases for *PTC* leaders, workshops, and participants; maintaining a *PTC* leader listserv; preparing and housing materials related to the program’s background, workshop promotion, and delivery on the WIHA website; and data collection.

PTC’s target population is unpaid or informal caregivers of an older adult family member (e.g., spouse, partner, parent), friend, or neighbor, whether the care recipient is living in his or her own home or apartment, the caregiver’s home, or in a facility. The caregiver may be living in the same community as the care recipient or caring from a distance (e.g., an adult child caring for a parent who lives in a different community or state). The program is not for paid caregivers such as home health aides or other professional caregivers.

PTC empowers caregivers with the skills and tools they need to maintain their *own* well-being while caring for another person. Each weekly session covers a different topic associated with caregiving challenges:

- Week 1: Taking Care of You
- Week 2: Identifying and reducing personal stress
- Week 3: Communicating feelings, needs, and concerns
- Week 4: Communicating in challenging situations
- Week 5: Learning from our emotions
- Week 6: Mastering caregiving decisions

Caregivers learn a new skill at every session including identifying stress triggers, how to engage in assertive communication with family and medical providers, how to deal with difficult emotions, stress management exercises, and more. Participants use the *Caregiver Helpbook*, a manual containing readings for each of the 6 sessions, plus added resource information the caregiver can use as reference after the workshop. Additionally, caregivers learn to create an “Action Plan” each week focusing on a self-care activity. Caregivers then have group support and accountability to help ensure completion of their weekly Action Plan or support them in problem-solving how to achieve it. This strategy helps the caregiver to prioritize and value self-care.

Leaders lead *PTC* workshops using proven cognitive behavior strategies including reframing, positive self-talk, and perception change. The program provides a supportive atmosphere where caregivers share similar experiences and build rapport to reduce the feelings of isolation so commonly experienced by caregivers.

Individuals most familiar with the program have identified many factors that they believe make providing *PTC* extremely worthwhile for their agency and their community. These include:

- an interactive, engaging curriculum builds self-confidence, understanding of emotions, increases self-care behaviors, and provides a supportive atmosphere for caregivers to share experiences and feelings
- an evidence-based program which has consistent positive results for participants
- opportunities to build partnerships with other organizations thereby benefitting other prevention programs and services offered by Aging and Disability Resource Centers

III. Key Components Needed to Implement a *PTC* Program

PTC requires several key components that are critical to the program's success. Many of these components are included in the Leaders Tips Manual provided during training. However, we will expand on a few of those key components here. "People Resources" include a program provider, program coordinator, a planning committee, program leaders, and partners. Supplies for both in-person and virtual workshops include: workshop charts, handouts, books, and snacks for each of the workshop's six sessions. Each of these elements will be examined in detail. Specific forms are available on the WIHA Website.

A. PROGRAM PROVIDER

A Program Provider is an organization that provides program oversight on a local level. Program providers employ (or support volunteer) program leaders. They work together with other partners in their communities to plan, organize, and deliver programs.

B. PROGRAM COORDINATOR

The Program Coordinator chairs the planning group, oversees the planning, implementation, maintenance, and ideally, expansion of the *PTC* program. The Coordinator develops relationships with partners and ensures availability of the supplies necessary to deliver the workshop. The Program Coordinator may act strictly as a Coordinator, or may be an individual from the Program Provider organization and/or a trained leader. In some communities, an agency may have a part-time or full-time coordinator of health promotion programs and *PTC* can become an additional program for this individual to coordinate. In others, particularly smaller communities and agencies, one person may have many roles and responsibilities, including coordinating this and other programs.

Desired Characteristics of Coordinators:

- ability to convene, lead, and motivate a planning committee to assist in the implementation of workshops
- exhibit good organizational and people skills
- ability to develop community contacts, especially in the business and health care sectors
- willing to be involved in civic or other groups where important contacts can be fostered
- ability to seek out and recruit good workshop leaders
- knowledge of where to seek funding to sustain the program

C. PROGRAM LEADERS

Two trained leaders are required to co-lead the workshop. Co-leaders assist and complement each other; they divide the script and decide who will record responses on the charts, and who will lead discussion for the various sections. Co-leaders work together to support participants and deliver a successful workshop.

The in-person Leader Training is two full days. The virtual Leader Training is offered in 3-hour periods for five consecutive days. In Wisconsin, all Leader Trainings are organized by the Wisconsin Institute for Healthy Aging (WIHA). The fee for the Leader Training includes the training time, materials the leader will receive at or shortly after the training, and the one-time license fee.

The Leader Training prepares trainees to use the extensively researched and tested appropriate language, cues, and cognitive behavioral strategies that are the foundation of the curriculum. Although leaders may add personal warmth and authenticity, because *PTC* is an evidence-based program, leaders must maintain the integrity of the script and not add or delete any content. Thus, individuals applying to become leaders should understand that the program is tightly scripted and that they may not add personal opinions and outside materials to the program.

In addition to leading workshops, *PTC* leaders work with program providers to plan, promote, organize, and follow WIHA's data collection protocols. Some workshop materials, such as handouts, brainstorm charts, etc. must be prepared in advance. The complete list of tasks for presenting a workshop is included under the Workshop Checklist in the Appendix (also located on the WIHA website in the Provider/Leader Login section)

Desired characteristics of leaders:

- Positive, empathetic, patient, enthusiastic, and responsible
- Good organizational skills
- Committed to confidentiality
- Passion for helping others
- Experienced in assisting caregiving and/or personal experience as a caregiver
- Comfortable speaking in front of a group of adults
- Able to connect one-on-one with the participants
- Dedicated to adhering to the scripted curriculum

Recruiting leaders:

Leaders should reflect the diversity of your clients and community. This is especially true for larger communities, where there will be more cultural and ethnic diversity.

When recruiting leaders, it is important to stress the *benefits* of becoming a leader. Benefits include:

- A profoundly rewarding experience; a way to connect with people on a deeper level. Leaders help caregivers through a very difficult time in their lives and witness the confidence that grows as they move through the weekly sessions.
- Develop additional skills in group facilitation.
- Remain engaged and productive in retirement, as part of 'healthy aging' plan.
- Share learnings from personal caregiving experience

Potential sources from which to recruit leaders include:

- Program provider staff*
- County or Tribal Aging and Disability Resource Center or Aging Units*

- University Extension county offices
- Disease and Disease Support groups, e.g., Alzheimer’s Association, American Heart Association, American Lung Association
- Leaders support groups*
- Residential facilities (e.g., assisted living, nursing homes, senior apartment complexes)*
- Former caregivers
- Past participants
- Community leaders with connections to potential partners
- Recently retired individuals or those planning on retirement looking for ways to use their skills and experience in a way they feel can make a difference for others
- Former teachers
- Librarians
- Faith community leaders
- Health care or social service professionals*

* Those who may have job responsibilities for ensuring caregiver programming and thus have access to human or financial resources necessary for conducting **workshops**.

Leaders should not have any responsibility to provide financial support for the workshop individually. Instead, leaders should be connected to a program provider organization or its partners that provide clerical support or other assistance for charts, handouts, snacks, and other needs (see below).

D. LEADER TRAINING

Potential leaders must successfully complete the Leader Training and be certified by the Master Trainers. Leader Trainings are offered in various locations in Wisconsin, or virtually, through the Wisconsin Institute for Healthy Aging (WIHA). In-person trainings are two full days, while virtual trainings are 3-hour sessions for five consecutive days. The trainings were designed by the national *PTC* organization so that trainees experience the six weeks in simulated sessions to learn what the program is about from the caregiver perspective, as well as have an opportunity for hands-on leader practice. For more information on upcoming leader training sessions please visit: <https://wihealthyaging.org>

Prior to applying for Leader Training, potential leaders and a staff member of the program provider organization must view the *PTC* Orientation Webinar. This webinar may be found in the Leader Training Application. Topics covered in the webinar include:

- *PTC* background
- Leader expectations
- Potential funding sources
- Marketing materials available on WIHA website
- Considerations for holding a workshop
- Finding partners

E. PLANNING COMMITTEE

A planning committee is vital to the success of the *PTC* program. Research shows that leaders should not be expected to, and indeed cannot, implement a program on their own. Experience shows that it is best for leaders to be selected and registered for training before the first planning committee meeting is held. The workshop should be held within three months after Leader Training so the leaders are confident in their knowledge and enthusiastic about the program. Once you have confirmed at least two leaders, you should assemble a planning committee.

Important roles of a planning committee include:

- Recruit individuals to serve as leaders
- Select workshop site, dates, and times
- Complete the Workshop Notification Form required by WIHA (on the WIHA website)
- Develop partners to assist with human and financial resources needed
- Develop and implement a participant recruitment plan
- Identify resources to purchase books and snacks
- Identify resources to complete the needed charts
- Make participant handouts, including demographic questionnaires
- Mail attendance log and questionnaires to WIHA
- Serve as ambassadors for the program, engaging or recruiting others to the program

Good candidates for Planning Committees are people with contacts in the community, those who work with older adults and caregiver populations, and those with an interest in helping others:

POTENTIAL MEMBERS	WHAT THEY CAN BRING TO PLANNING COMMITTEE
Workshop leaders	-Knowledge of workshop, experience working with caregivers
Healthcare Providers (e.g., RNs, Nurse Practitioners, Social Workers, dentists, Chiropractors, eye doctors)	-Refer patients to workshops -Potential leaders -Help create awareness for <i>PTC</i> by talking to other health care professionals within their facilities
Advocacy or health organizations (e.g., Alzheimer's Assn., Parkinson's Found., American Cancer Society.)	-Refer people to workshops -Potential leaders -Help promote workshop -Space for workshops
Past workshop participants	-Experience with the workshops and as caregivers
Clergy	-Offer space for workshops -Identify volunteers -Refer congregation members who are caregivers -Promote workshop in church newsletter or bulletin
Long-Term Care providers	-Offer space

	-Help recruit caregivers of residents -Help marketing workshop
Parish Nurses	-Refer patients/clients who are caregivers -Help recruit and promote within their parish
Local business/community leaders	-Good connections to potential partners, leaders, and participants
County or Tribal Aging Unit staff, Aging & Disability Resource Center staff, EBS, DBS (those with caregiver and health promotion program responsibilities)	-Potential leaders -Refer participants -Share resources (space, A-V equipment, flipcharts, etc.) -Promote workshops to workers within their agencies
Adult Protective Service professionals	-Refer family members of clients to workshop
Local University/college professors/staff	-Space -Promote workshop to colleagues -Potential leaders -May have students who need volunteer hours and could help with class preparations/marketing
Learning in Retirement groups	-Potential leaders -Promote workshops

Desirable characteristics of planning committee members:

- good follow-through
- outgoing, well-liked, and enjoy working with others
- respected in their profession and agency/organization
- good connections in community
- experience in delivering programs

Here's an example of how one Wisconsin county's Planning Committee (Manitowoc) implements its *PTC* program:

- ✓ The Caregiver Coordinator serves as the *PTC* Program Coordinator. She convenes two meetings per year for the Planning Committee to organize a spring and fall *PTC* workshop.
- ✓ The Coordinator invites:
 - all currently trained workshop leaders
 - hospital and clinic representatives
 - a library employee
 - an insurance businessman
 - managers from assisted living facilities
 - other partners who have provided support for past workshops.
- ✓ The coordinator schedules the first meeting late in the calendar year to plan the spring workshop.
- ✓ The coordinator arranges a lunch for the members.

- The coordinator chairs the meeting and uses the Planning Guide or Checklist, tailored to fit her county’s needs. (Available on the WIHA webpage)
- ✓ In consultation with the leaders, the committee selects the workshop dates and times
- ✓ The committee selects a location, making sure it has adequate parking, is available by public transportation, has accessible space (including bathrooms), has appropriate wall space to hang charts, has storage space for charts and non-perishable snack items, and has the needed A-V equipment.
- ✓ The group works down the agenda – volunteers choose some tasks; the committee assigns others.
- ✓ The committee decides which strategies will be used to reach out to potential workshop participants. The coordinator makes a list of members who volunteer to talk to make personal contacts, or do presentations to churches, civic and other groups.
- ✓ The coordinator creates a marketing plan of strategies and media contacts. She does the newspaper ad buys, prepares and distributes news releases and PSAs, and arranges for radio spots, based on both her experience with program promotion and knowledge of what her budget can accommodate.
- ✓ Going forward, the committee members complete their tasks and follow up with the coordinator, who monitors progress until the workshop is ready to start.
- ✓ As the first workshop is finishing, the coordinator organizes a second meeting to de-brief on the success of the first workshop and plan the fall workshop.
- ✓ If there is a waiting list of people for the workshop, the committee assigns individuals to contact these caregivers about the second workshop.
- ✓ Note: Attention is paid to requests for an evening class. If there is enough interest from potential participants, the committee schedules an evening class for employed caregivers for the summer months when days are longer. Again, the committee uses the Planning Guide to assign tasks based on who is willing to do which task.

Manitowoc County has successfully used this strategy for many years. It has proven to be an efficient method to plan and implement workshops. In addition, because many of the planning committee members have worked together so long, the twice yearly meetings are a time for members to enjoy getting together as they work together for a common cause.

Some counties plan their workshop dates months in advance so they can include that information on all their public communications (e.g. newsletters, website calendars, social media, etc.)

The following is a sample Planning Committee Agenda for both in-person and virtual classes.

Planning Committee Agenda:

- A. Welcome and Introductions
- B. Explanation of *PTC*
- C. Decision Items and Task Assignment
 1. Select workshop location, dates, and times (including “rain date”):

- Mornings are often difficult for caregivers. They must get themselves ready for the day and then tend to their care recipient, getting that person up, fed, bathed, and dressed and take care of any other arrangements for the day.
 - Afternoons are often better, with a longer stretch between lunch and supper, and often, the care recipient rests or sleeps and it is easier for the caregiver to find someone to stay with the care recipient while the caregiver attends the workshop.
 - Evening classes are easier for working caregivers to attend. Consider including a light supper to help make it convenient for caregivers.
2. Decide on 90 min. or 2.5 hour format:
 - Evening workshops using the 90 minute *PTC* format are good for working caregivers. If providing the 2.5 hour format, consider including a light supper to help make it easier for the person to attend.
 - The 90 minute format must be used for virtual classes.
 3. Assign leaders: Make sure that two leaders (already trained or registered to become trained) are available to lead all 6 workshop sessions.
 4. Select Location: Choose a location that is accessible, has adequate parking, a private meeting room with space to arrange tables and chairs, and adequate wall space to hang charts. A kitchenette is handy for coffee and snacks, and storage space is nice so supplies can be stored to reduce transporting items such as easels, resource materials, and kitchen supplies back and forth. Restrooms should be nearby and accessible.
 5. Decide on Registration form: Decide whether to use the form on WIHA website, adapt it, or create your own.
 6. Assign agency or individual to receive registrations: Identify agency or individual who will take registrations.
 7. Determine Fee: Determine workshop fee, if any. It is recommended that there be a small registration fee to attend the workshop as experience has shown that participants will be more committed if they have paid a fee. The range of fees in Wisconsin historically has varied from \$0 to \$30, depending on the community. In determining fee, be mindful of the cost of the books (approximately \$20/each, depending on number purchased) and whether books will be loaned or given to participants, and whether any partners are contributing funds towards the purchase of books. Also note whether your organization prohibits having a registration fee and instead states to ask for a suggested donation.
 8. Complete and submit Workshop Notification Form: Determine who will complete the form so that it is submitted to WIHA as soon as possible. Find the form on the WIHA website.
 9. Decide who will Purchase Books: Purchase Books well in advance of a workshop. Allow 6 weeks for receiving an order. To purchase books, go to: <http://www.powerfultoolsforcaregivers.org/book-store/>
 10. Make or Order Flipcharts: Determine who will take responsibility for making the brainstorm flipchart. Note: Two types of flipcharts are used during a workshop: brainstorm and pre-drawn. Brainstorm flipcharts must be re-created for each workshop because they are used to write ideas by the participants. Pre-drawn and

Brainstorm flipcharts are available for purchase as a set or on PowerPoint from https://order.e-arc.com/arcEOC/x_project.asp?de=97bf7ca0-30d2-46ad-b547-5d039f465509

11. Copy needed handouts: Decide who will make workshop handouts.
12. (In-person Classes) Arrange for Refreshments: Determine who will purchase the refreshments.
13. Arrange for respite (optional): Decide what respite options are available; volunteer caregiver organizations, family caregiver programs available through the aging office; respite through the VA service office, or others.
14. Arrange for transportation (optional): Caregivers may need a ride. Discuss options for transportation: volunteers, transportation services through county offices, nearby mass transit, etc.
15. Conduct Outreach: visits and contacts should be made to places that will help promote the workshop and provide recommendations or referrals of participants. See below and WIHA Marketing Materials at wihealthyaging.org
16. (Virtual Classes): Decide how the participants will get the handouts (whether by email or mail).

As decisions are made and tasks assigned, a planning committee or coordinator can use the following Checklist to record the decisions and plans.

Powerful Tools for Caregivers Workshop Checklist		
Dates:		
Location:		
Time:		
Leaders:		
1.	contact number:	
2.	contact number:	
Registration fee:		
<i>Caregiver Helpbook</i> provided, or for loan, or for purchase?		
TASKS		
Person Responsible	Task	Date to Completed by
	Location arrangement	
	Registration form preparation	
	Book purchase	
	Workshop Notification Form completed	
	Copy brainstorm charts	
	Arrange supplies	
	Arrange refreshments	
	Make copies of handouts	
	Make arrangements for respite, if needed	
	Make arrangements for transportation, if needed	
	Send workshop materials to participants (virtual classes)	
OUTREACH– See WIHA Marketing Guide		
https://wihealthyaging.org		
	Church Visits/Clergy Association meeting	
	Healthcare Provider visits	
	Meal Site Presentations	
	Newspaper ad	
	News article	
	News release/PSA	
	Radio spots	
	Radio Talk show guest	
	Website	
	Aging Newsletter	

F. PARTNERS

Partnering with other organizations, agencies, and/or businesses is a critical strategy to successfully implement your *PTC* program. Making contacts with people from varied work or social environments will result in having a broad range of people potentially interested in becoming workshop leaders, planning committee members, or partners. Active involvement in a civic group will provide direct contact with key individuals who will help open doors to start or grow a *PTC* program.

Benefits of Collaborating with Partners:

- Helps offset the expenses of holding workshops – a partner can provide space to hold the workshops, refreshments for participants, or the cost of books.
- Can provide a cost-efficient way to market the program to a variety of audiences, e.g., a partner can promote the workshop in-house, to their customers, pay for fliers or newspaper ads.
- Can be a potential source of leaders.
- Can help recruit participants from inside the partner’s organization or through outside marketing efforts.

A vital strategy in partner development is making community connections, i.e., networking. Participation in civic organizations such as Lions, Rotary, Optimists, Chamber of Commerce, etc. is an excellent way to make important connections. It is a way to bring your expertise on elder care resources and evidence-based programs directly to individuals with aging family members who are seeking information or who can refer others to your agency. You will become a valuable resource both for family caregivers and for people dealing with chronic illness, aging issues, and those want to remain in their homes as long as possible.

When considering partners, think about why *PTC* would make sense for a partner to invest time and resources. It is very important to approach partners in a spirit of offering them the opportunity to participate in this effort and to identify what benefit it would provide the partner, rather than being perceived only as asking or needing the partner to assist you.

The following chart listing potential partners, why they might be interested, and how they can benefit your *PTC* program. As the chart demonstrates, each partner may have very different interests as to what they would gain from being a partner, how *PTC* program can benefit them, and how they could be engaged.

POTENTIAL PARTNERS	WHY ORGANIZATION MIGHT BE INTERESTED	POTENTIAL ROLE
Aging unit, ADRC, Public Health	-Opportunity to collaborate with each other and the community - <i>PTC</i> fits their mission to provide services for older adults and their families.	-Source of leaders -Registration -Promotion/Outreach -Making the flipcharts -Funds for charts, books, snacks

	-Grant funding may be available to initiate a collaboration that would continue	-Space
Health care providers	-Evidence-based health promotion programs are a good fit with the healthcare mission -Can offer a credible, evidence-based program to patients and their families -PTC is a great resource for hospitals and skilled nursing facilities to include in their care transition efforts, which increasingly focus on the family and caregiver of the patient being discharged	-Source of leaders -Promotion/Outreach -Identification and referral of patients -Funds for charts, books, snacks -Space -Incentives for participants (e.g., coupons for cafeteria, gift shop, etc.) -Resource table materials
Local business	-Caregivers represent a big market for businesses like restaurants, pharmacies, insurance or law firms, and banks -Helps them be viewed as community-focused	-Promotion -Funds for charts, books, snacks -Space -Incentives for participants -Provide a light meal
Local disease groups (e.g., Alzheimer's, Heart Assn., Diabetes, etc.)	-Helps them reach their target audience to educate and/or attract donors	-Source of leaders -Promotion/Outreach -Identification and referral of patients -Resource table materials -Space
Disability groups (e.g., Independent Living Centers, The Arc of Wisconsin, Support groups for caregivers of adults with disabilities, etc.)	-Helps them reach their target population and their caregivers	-Source of leaders -Promotion/Outreach -Identification and referral of clients -Space
University Extension County Offices	-Fits their mission to help provide community education, opportunity for collaboration with other county agencies, health care, business, etc.	-Source of leaders -Promotion/Outreach -Funds -Make the charts -Resource table materials
High school or college interns/volunteers	-Some school districts require students to provide community service work to graduate high school	-Make charts -Copy handouts -Make participant packets -Hang signs -Distribute brochures

	<ul style="list-style-type: none"> -Some college students must perform community service when taking certain classes -College interns need experience and a recommendation when entering the job market 	<ul style="list-style-type: none"> -Make a cool media display -Mailings -Create Facebook page
RSVP/Volunteer Caregiver Organization	<ul style="list-style-type: none"> -Fits with their mission to assist older adults -Opportunities for them to find potential volunteers, network with potential donors 	<ul style="list-style-type: none"> -Registration -Purchase/deliver snacks -Make charts -Drive participants to workshops -Provide respite
Residential facilities	<ul style="list-style-type: none"> -Looking for new residents; want to get people in to see the facility -Want to be perceived as community-minded -Caregivers are a prime audience as they may be interested in a different living situation for care recipient at some point 	<ul style="list-style-type: none"> -Promotion/outreach -Refer family members -Space -Respite -Snacks -Funds for charts and books
Faith-based organizations, including clergy, lay clergy, parish nurses, etc.	<ul style="list-style-type: none"> -Want to continue their mission in the community -Potential draw for new church members -Provide support for caregivers in congregation 	<ul style="list-style-type: none"> -Promotion/outreach -Refer specific family members -Space -Respite -Snacks
Adult Day Care Providers	<ul style="list-style-type: none"> -Looking for clients -Like to have the public see their facility 	<ul style="list-style-type: none"> -Provide space -Refer caregivers to workshop
Past participants	<ul style="list-style-type: none"> -Way to stay involved when caregiving has ended 	<ul style="list-style-type: none"> -Ambassadors for the program -Become trained as leaders -Assist with workshop planning

Some of the most vital partners for a *PTC* program are healthcare organizations and businesses. The following two sections address them specifically.

HOW TO APPROACH AND ENGAGE A HEALTHCARE ORGANIZATION

Engaging a healthcare partner is critical to the success of a *PTC* program. A hospital, clinic, or individual medical provider can recommend and refer patients to workshops. In return, the *PTC* program can be part of the services they can rely on to support caregivers who will provide the follow-up care once a patient is discharged from the hospital. Currently, medical centers are looking carefully at community resources available to help patients and their families after discharge as part of an overall effort to reduce the potential for a patient to be readmitted to the hospital.

Be aware that in large medical systems, it can take time, sometimes months to create a relationship between your agency and the provider system. Most health care centers have had little (or no) experience working with county and non-profit social service agencies and therefore may be unfamiliar with what services or programs are available, or whether those programs are credible.

Note: Research has shown that before referring a patient to a program or service, health care partners want to know that the program meets the “3 C’s”:

1. Cost: Fee is reasonable for their patients
2. Convenient: Location and time is convenient for their patients
3. Credible: Program is evidence-based with proven positive outcomes

Preparation

- Consider how and who to approach:
 - If a medical center or hospital, contact the Medical or Discharge Social Worker, or Care Transitions RN - they will know which patients are going home in a caregiver situation and which might need support.
 - If a clinic, talk to the clinic manager. The clinic manager can arrange to have providers at the meeting and in a smaller clinic, can be your contact person for referrals. A large clinic may refer to the clinic social worker.
- Explain that you would like to meet with them for no longer than 30 minutes to explain an evidence-based program that you believe would fit well with their efforts to help patients and families after discharge.
- Briefly explain *PTC* and how it helps caregivers take better care of themselves and thus, the patient.
- Agree on a date, location, and specific amount of time.

Day of Meeting

- Take along the *PTC* fact sheet with evidence-based information, a copy of the Caregiver Helpbook (<http://www.powerfultoolsforcaregivers.org/book-store/>), and referral forms. Explain in more detail specifically:
 - The scientifically proven outcomes of *PTC*
 - How *PTC* can enhance the hospital’s efforts to provide post-discharge patient and family education or the clinic’s efforts in educating and supporting patients’ caregivers.

- That your agency is inviting partners to help provide the workshop in your community. Be clear that you are not asking for staff time to provide the workshop.
- That your agency will do the actual workshop set up, delivery, and clean up.
- That research shows that caregivers are more likely to register for the workshop if recommended by a professional and ask if they would talk to patients about the program.
- Invite them to share the information about the workshop with their patients. Make clear that you want to help the provider help their patients.

Do not be put off if the meeting is cut short or even cancelled. Health care providers are under constant pressure to see patients and keep to a schedule. Some days are busier than others and emergencies can happen at any time that would require the attention of the person(s) with whom you are meeting. Express your understanding and appreciation of this.

The next step depends on whether or not the person with whom you speak will need to involve other decision-makers or units of their organization. Mutually decide when you should call to check in to give him/her time to talk to the appropriate person. Send a personalized e-mail thank you for their time right after the meeting, and then be sure to follow-up as agreed.

If at that point the person with whom you are meeting agrees that it fits with the mission of their organization and they are willing to begin working with you (often the case in a smaller or rural community), then:

- Discuss a potential referral or recommendation system. Many health care systems already have one in place.
 - If one is in place, follow their lead and explore how *PTC* could be included in their existing referral system. Provide a few copies of *The Caregiver Helpbook* that the provider can show to patients when explaining the program and offer to provide brochures that can be given to patients.
- If the provider does not have a referral or recommendation system in place, share your referral forms and explore how they might be adapted for their use. Also provide a few copies of *The Caregiver Helpbook* and workshop brochures.
 - Explain how the referral form can be used: After the provider talks to the patient and recommends taking the workshop, he/she can ask the patient to read and sign the referral form, which the hospital or clinic can fax to the agency or person handling the registrations. The person handling registrations can then contact the patient and follow through. This method should not pose a confidentiality issue for the provider, as the patient signs the agreement to let the hospital make the referral.
 - Leave workshop brochures and a few copies of *The Caregiver Helpbook*, which providers can show to patients.
 - Ask to set up a display in the patient waiting area featuring *PTC* information and other resources provided by your agency. This can complement the effort by the provider to talk to patients.

Follow-up is critical! This should be done consistently with the contact person(s). Send a personalized email thanking them for their support and time, indicating next steps, and if a referral system is put in place, providing updates on patient and providers' responses, number of workshop registrants, encouragement to continue the process, etc. Regular communication is key to relationship building.

HOW TO APPROACH AND ENGAGE A *BUSINESS*

As with a health care partner, it takes time to develop a relationship with a business. Choosing a business for which you already have a contact is a good way to start. This is where it pays to be involved in civic groups where contacts can be made easily. These contacts will smooth the way when it is time to make partner calls.

Preparation

- First, decide which local businesses to approach and why (e.g., someone on your planning committee has a relationship with the business owner or key employee, you have identified the mission of the business as having relevance to caregiving).
- Research their history of community involvement, reputation, business culture, and their competition. Make sure their mission fits with the idea of helping families, their employees, their support for older adults, and/or that involvement with *PTC* aligns with the business's marketing goals.
- Call the contact person and ask for a meeting (half hour or less) to explore the potential for collaboration on a project that has benefits for the business and for the community.

First meeting strategy:

- Depending on the size and type of business, the purpose of the first meeting is to learn more about the business, introduce yourself and *PTC*, and leave the door open for a second meeting. A smaller business or smaller community may not require a second meeting so be prepared to get to the issue at hand.
- The Program Coordinator and another agency person who knows the program well (such as a leader) should attend the meeting. If the person who referred you is available, he or she would be a good choice as that person can break the ice and lend credibility to your cause.
- The key message is how *PTC* can fit with the business' mission and marketing plan. Take along the *PTC* information sheet, which includes an overview and background of *PTC*, credibility and popularity of the program, data describing the population to whom the program is aimed (highlight any connections to the business' target audience), the program's proven outcomes, a list of ideas of how the business can be involved, and your business card.
 - Invite the business' representative to share with you their business' mission, history, customer base, and employee demographics.
 - Listen carefully to what is important to the business.
 - Listen for commonalities between *PTC* and the business's aims.
 - Explain *PTC* and how involvement with the program could aid the business.

- Be mindful of the person's/people's time. End the meeting 5 minutes prior to your stated time.
- Ask to set up another time to meet. Ask them if there are others in their business or agency that it might be important for you to share information about *PTC*.
- Identify a future date you will contact them to give them the opportunity to talk to others in the organization.
- Follow-up as promised.
- If the person with whom you are meeting cannot commit to providing support for the program, stress the similarities of your goals. You might say something like: "it feels like we have many of the same goals and we interact with the same client/customer base. I can see that [business name] is interested in improving our community, and helping employees/ citizens who are caregivers. I would like to set up another time to meet, after you've had a chance to talk with others in your organization, to keep exploring."
- Be sure to set up a tentative next meeting date before leaving. Promise to follow-up within a couple of days. Leave the materials you brought with the person and leave before your stated time.

Second meeting, if necessary:

- Review the common aims identified in the first meeting.
- Review what *PTC* is, how it is beneficial to their employees or customers/clients who are caregivers, and how it will be a unique way to reach their target customers.
- Give them the *PTC* fact sheet, stress that it is evidence-based, i.e., researched and proven.
- Describe the opportunities for them in contributing to the delivery of *PTC* including: providing space; funds for leader registration or travel; participant books; workshop charts or snacks/supper; referring clients or customers; or any other ideas they have. If you have partnered with another business, this might be a good time to mention what the other business will be offering and make a suggestion of something they could provide.
- Describe the promotional materials and how the business will benefit from the marketing (e.g., their logo on promotional materials, acknowledgement in your newsletter, on website, a sticker or sign in front of snacks or on materials distributed, etc.)
- Agree on what the business will provide and determine who your working contact will be. Tell them you will follow-up with the contact person within the next two days.
- End the meeting 5 minutes before you said you would. Respect their time.
- Follow-up is critical!

IV. Recruiting Workshop Participants

Strategies for finding workshop participants vary according to community. In some areas, newspaper ads are a great way to attract participants. In others, direct mail to the ADRC or Aging office client list works well. Experience shows that the most successful strategies to attract participants are:

1. Referral or recommendation by a past participant
2. Individual recommendation from an in-person presentation or one-on-one discussion
3. Referral from a trusted source, especially health care providers

The chart below summarizes strategies that can be used by leaders, planning committee members, partners, or others. For more complete information, review sections in this guide, review the WIHA Marketing Materials on the website (<https://wihealthyaging.org>), and use the suggestions in each section to create your own unique marketing/recruiting plan.

Remember: there is no *one* way to recruit participants. Try various strategies and make sure the registrar notes how an individual heard about the program so that you will be able to evaluate how each strategy worked.

Note: Items marked with an asterisk can be found in the appendix.

ENTITY	RECRUITING STRATEGIES
County or Tribal Aging and Disability Resource Center (ADRC)	<ul style="list-style-type: none"> -Information and Assistance workers call known caregiver clients and recommend program. ADRC sends out printed information about upcoming <i>PTC</i> program in client packets -Include information about <i>PTC</i> on agency website and calendar -Ask Elder/Disability Benefit Specialists to contact caregiving clients and recommend program
County or Tribal Aging Unit (in some counties is part of the ADRC)	<ul style="list-style-type: none"> -Make contacts with National and Alzheimer’s Family Caregiver Support programs clients -Recommend to clients who call for rides. Volunteer driver can follow up by giving person brochure* at time of pick-up -Make presentations at meal sites -Include information on <i>PTC</i> in newsletters, and on agency website* - Recommend workshop at outreach events
Public Health	<ul style="list-style-type: none"> -Planning Committee members staff a booth at wellness clinics to provide information and ideally, sign people up
Planning Committee members	<ul style="list-style-type: none"> -Make individual contacts with caregivers they know -Promote workshop at their business, or job
Leaders	<ul style="list-style-type: none"> -Contact past participants and ask them to refer a friend*
Clergy	<ul style="list-style-type: none"> -Recommend caregiver congregants pursue the workshop
Health Care Professionals	<ul style="list-style-type: none"> -Put posters* or brochures* in waiting areas or examining rooms

	-Refer specific caregiver patients
Restaurants	-Ask owners to help promote to customers using table tents, placemats, posters,* or brochures provided by Coordinator
Pharmacies	-Ask pharmacists to discuss and put brochures in prescription bags of customers clearly picking up medications for others*
Grocery stores	-Ask include brochures* as bag stuffers on senior citizen days (smaller communities)
Businesses	-Sponsor in-house promo/awareness campaign
Media	-Ads, news releases*, PSA's, radio spots, feature article on caregiver who took workshop
Past Participants	-Tell friends -Accompany and make presentations -Provide testimonials for brochures -Agree to be interviewed for newspaper story
UW-Extension	-Collaborate with the Home and Community Education (HCE) club in their community. -Connect with agents that may provide services to other participants and know those who are caregivers

SOME COMMON OBSTACLES AND HOW TO OVERCOME THEM

Reaching the Caregivers

If you were to ask someone who is taking care of a spouse if they are a caregiver, you might get a confused look. Research shows that most caregivers do not self-identify, or see themselves as “caregivers”. They are simply a husband or wife helping their spouse get out of bed and get dressed each morning, or an adult child taking an aging parent to medical appointments or balancing their checkbook. Some are parents who assist an adult child with a disability with activities of daily living. And some are middle-aged adults who arrange for someone to check-in on a parent who lives across the country.

It can be difficult to reach these caregivers. People who don’t think of themselves as such will not notice advertising directed toward “caregivers”. Therefore, many program coordinators across Wisconsin and in other parts of the country avoid use of the word “caregiver” in their marketing efforts.

Instead, they use phrases or ask questions intended to capture the attention of someone who is performing the tasks of a caregiver. An example of a good way to phrase an ad, flier, or start a public service announcement is to ask questions with which they will identify:

- Do you take an elderly parent to medical appointments?
- Do you stop by your mom’s home on your lunch hour to check on her?
- Do you help your husband or wife take their medications, or get dressed in the morning?

- If you are helping someone who can no longer do the things they used to do, or because you worry about their well-being, there is a workshop just for you...

Examples of ad and flier copy, as well as PSA's, news releases, and other marketing tools which use this strategy are included in the appendix.

Caregiver who is stressed out or doesn't have time for workshop

There is no doubt that caregiving is stressful. Finding time to attend a workshop can be difficult for caregivers, especially if they are also employed. One way to make it easier for caregivers to attend a workshop is to have a variety of times and days that the workshop is held. Some counties have responded by scheduling evening workshops to accommodate working caregivers, or by holding weekend workshops for those who cannot attend during the week. Counties who do this keep a list of people who have difficulty finding time during the week and when there are enough people, the workshop is scheduled. Other programs are held in the morning which some caregivers find to be the best time, and for those who find mornings to be busy, afternoon workshops would be a better choice. Now the *PTC* workshop is also available for virtual delivery, which allows caregivers to remain in-home with the care recipient and can allow more flexibility for time of day. Whenever you schedule your workshop, for in-person workshops it can relieve stress for a caregiver to provide snacks and refreshments for daytime workshops, or a light meal for evening workshops.

Caregiver can't leave his or her care recipient to attend workshop

Another important way to help relieve the stress on caregivers of finding time to attend a workshop is to offer respite care for care recipients. This would allow the caregiver to feel less anxious about taking a few hours to focus on their own needs and not have to worry about the safety or well-being of the person for whom they care.

Respite can be provided by a friend, neighbor, adult day service, or home-healthcare agency, to name a few. Many times, friends or family will stay with the person for a couple hours if asked by the caregiver. The type of respite needed will depend on the needs of the care recipient. If the person requires a higher level of care, it will be necessary to have an experienced person provide the respite, and this may result in an extra expense to hire someone.

Respite care can be paid for through several programs. The National and Alzheimer's Family Caregiver Programs (NFCSP/AFCSP) offer funding so the caregiver can hire someone to provide the respite. There is no restriction on who is hired; it can be an agency or a family member or friend. It can also be used to pay for adult day services or other providers. Another option is the Veteran's Service Office. Respite is available for caregivers of veterans. The local Veteran's Service Office will be able to provide more information. The program coordinator can let the caregiver know that respite funding is available and help connect the caregiver to the appropriate place.

Another option as of 2021 is to provide a virtual workshop. This allows caregivers to remain in the home while not needing to leave their care recipient.

Caregiver does not have a way to get to the workshop

Some caregivers lack transportation to and from workshops. Many counties offer rides through their senior transportation programs. Often, people who take the workshops arrange to ride with one another if someone does not drive. If your county has a volunteer caregiver program, arranging a ride for someone could be done through that organization. The National and Alzheimer's Family Caregiver Support Programs can also be used to pay for transportation.

Caregivers may not ask these questions and just assume that they can't get away, don't have time, or don't have a ride, etc. It's a good idea to let the caregivers know these options are available by stating it in your brochure, on your flier, PSA, etc. Examples are included in the appendix. *The easier you can make it for a caregiver to attend, the easier it will be to fill your workshop.*

If you are offering an in-person workshop that the caregiver is not able to make it to, also consider offering a virtual workshop in the future and note to the caregiver that you will put them on a notification list for that when it becomes available. Virtual programs help to remove several barriers caregivers may face.

V. Appendix/Tools

These materials are available on the Wisconsin Institute for Healthy Aging (<http://wihealthyaging.org>) in the Provider/Leader Login section for *Powerful Tools for Caregivers*.

You must have login credentials (LOGIN and PASSWORD) to access these materials. All active WIHA *PTC* Program Leaders and Program Providers have been sent their LOGIN and PASSWORD. If you do not have these credentials, please contact WIHA-info@wihealthyaging.org.

- Planning You Workshop
- Workshop Notification Form
- *PTC* Planning Guide
- Church Bulletin Insert
- Workshop Checklist
- *PTC* Participant Registration Form
- *PTC* Class Signage
- *PTC* Brochure (template)
- Workshop Specific Brochure
- Consent to Use Image
- *PTC* Completion Certificate (template)
- AIKIDO (template)
- DESC (template)

You may order *The Caregiver Helpbook* directly from *Powerful Tools for Caregivers* at <http://www.powerfultoolsforcaregivers.org/book-store/>

Church Bulletin Insert

Dear Faith Community Member,

The following is a notice about an upcoming workshop for family caregivers. If you have space, would you please include it in your bulletin? A few brochures are also enclosed. If you prefer to have this emailed to you, please contact me at [email address]

Thank you for your help with this important workshop for family caregivers.

Powerful Tools for Caregivers

Are you caring for an ill spouse or older family member? Do you sometimes find yourself overwhelmed by responsibility? Are you unsure how to manage caregiving responsibilities and still tend to your own needs? ***Powerful Tools for Caregivers*** will help you learn skills to cope with the demands of caring for someone; assertive communication, handling challenging situations, stress management, and more! You'll be able to share concerns and find solutions in a confidential, comfortable atmosphere under the guidance of trained class leaders.

Classes meet weekly for 6 weeks for [workshop length] hours. Respite care may be available if you need someone to stay with your care recipient while you attend the workshop. The registration fee is just \$[fee], which includes six weekly sessions and "The Caregiver's Helpbook", a guide to help you on your caregiving journey. Refreshments will be provided.

Classes meet [day, dates] from [time to time] at [location]. Space is limited. To reserve a place, or if you have questions please call [contact name, title, and phone]. Powerful Tools for Caregivers is sponsored by the [sponsoring agency/organization].

Q&A About Workshop

WHY SHOULD I TAKE A *POWERFUL TOOLS FOR CAREGIVERS* WORKSHOP?

A Powerful Tools for Caregivers workshop will give you the skills you need to take care of yourself while taking care of someone else. It is important for you to take time to focus on your needs, find ways to relax, and do the things you want to do to maintain your health and well-being.

CAN I AFFORD TO TAKE A WORKSHOP?

Workshops are low cost and affordable for participants. However, if you need help with the registration fee, please call us at **[INSERT PHONE NUMBER]** and we can help.

I DON'T HAVE A WAY TO GET TO THE WORKSHOP

We may be able to help! A ride may be provided to you either without charge, or for a small fee. Please call us at **[INSERT PHONE NUMBER]** Workshops are held in various areas of the county to make it easier for caregivers to attend without having to travel long distances.

I CAN'T LEAVE MY CARE RECIPIENT ALONE TO ATTEND THE CLASSES

We want you to feel free to take the workshop. Here are some ideas if you feel you can't get away:

- Have a friend, family member, or neighbor check-in or visit with the person while you are gone.
- Ask your clergy person if someone from your parish or congregation can visit with your care recipient while you attend the workshop.
- There may be an adult day-service in your area that would take good care of the person while you are gone.
- Respite funding to hire someone to come to your home or pay for the cost of adult day-services may be available through the Family Caregiver Program in our county. Please call **[INSERT PHONE NUMBER]** for more information.
- If your care recipient is a veteran, there may be funding to hire someone to provide respite. Call the Veteran's Service office at **[INSERT PHONE NUMBER]**.

I DON'T HAVE TIME TO TAKE A WORKSHOP

If you don't take time to focus on your health and well-being – who will? Often a caregiver is the one who ends up becoming sick or disabled from stress-related illness. You deserve time away from your caregiving role. This can also be a good thing for the care recipient as well – it is an opportunity for that person to visit with or see other people.

For more information on an upcoming *Powerful Tools for Caregivers* workshop:

[NAME, TITLE]
[AGENCY]
[PHONE]
[EMAIL]

Insert your logo here

Employer Fact Sheet

- Studies show that caregivers face increased health risks associated with caregiving. Depression, anxiety, social isolation, and physical symptoms are the most common consequences.
- Financially, caregiving takes a toll as well. Often caregivers reduce hours, leave employment, or retire earlier to provide care to a loved one, resulting in lost wages, and smaller benefits, with a more severe effect for women.
- According to a 2011 MetLife study, the total financial loss to employed caregivers including loss of wages, time, social security, and pension is estimated to be about \$3 trillion.
- There is a cost to employers. Tired, distracted, unproductive employees cost money in terms of lost time, accidents, more sick days, and higher turnover as people leave their jobs to care for someone at home. Workers sometimes arrive late, leave early, or take time off during the day to take a parent to the doctor or make personal phone calls during work time.
- The number of caregivers will increase in the coming years as the population ages, which will create more caregivers, particularly those in the “sandwich generation” – employed people who care for aging parents, and teenaged children at home.
- Community agencies like the Aging and Disability Resource Center are addressing the needs of family caregivers in an effort to lessen the negative effects that millions of caregivers will experience and what that will mean to employers.
- *Powerful Tools for Caregivers (PTC)* is a high-level evidence-based workshop for people who are taking care of a family member. It is based on a chronic disease self-management program developed at Stanford University.
- *PTC* is presented in six sessions that meet once a week for either **1 ½, 2, or 2 ½** hours in a community setting such as a business, hospital, senior center, library, community center, etc.
- *PTC* has been shown to have positive results for caregivers:
 - ❖ Greater Self-efficacy
 - ❖ Better Emotional well-being
 - ❖ Practice more Self-care behaviors
 - ❖ Increased awareness and use of community resources
- Topics include:
 - Week 1: Taking care of YOU
 - Week 2: Reducing Personal Stress
 - Week 3: Communicating Feelings, Needs, and Concerns

Week 4: Communicating Effectively with Others
Week 5: Learning from our Emotions
Week 6: Mastering Caregiving Decisions

How PTC Can Benefit **[INSERT NAME OF BUSINESS]** (**CHOOSE THE POINTS THAT PERTAIN TO WHAT YOU ARE ASKING OF THE BUSINESS – PARTNERSHIP, or ALLOWING PTC TO BE PART OF EMPLOYEE PROGRAM AT THE WORKPLACE**)

- *Powerful Tools for Caregivers* represents a valuable, proven resource to support employees who are also caring for a spouse, aging parent, or other loved one.
- A great addition to your employee assistance program.
- Healthier caregivers are more productive and focused at work, and have fewer sick days.
- A new way to reach out to your existing customers or clients.
- Can be part of overall cost-effective marketing strategy to attract new customers.
- Create awareness for your services or products in the community by helping to sponsor a workshop.
- Can be involved at the level that best fits your organization: offer meeting space and refreshments, underwrite expense of books, help promote the workshop to your customers and clients in your newsletter, advertising, etc.
- Fits with the corporate mission to build a stronger, healthier community.
- An opportunity to collaborate with community agencies and organizations.

Benefits to Caregivers:

- Caregivers are able to better care for their loved one when they take better care of themselves, thus keeping their loved one at home longer – *when people stay in their homes, they continue to support businesses in the community.*
- Caregivers learn how to manage stress and deal with difficult emotions which helps them be more productive, less anxious, and have fewer sick days.
- Evening or weekend workshops can be held for working caregivers.
- Caregivers learn what community resources are available and how to access them.
- Workshops are low cost and convenient.

Powerful Tools for Caregivers is sponsored by: **[NAME OF AGENCY]**

For more information contact:

[NAME, TITLE]

[PHONE]

[EMAIL]

Provider/Health Care Fact Sheet

- *Powerful Tools for Caregivers (PTC)* is a high-level evidence-based curriculum in a workshop format for people who are taking care of a family member or friend. It is based on a chronic disease self-management program developed by Dr. Kate Lorig at Stanford University.
- *PTC* Positive results are:
 - ❖ Greater Self-efficacy
 - Caregivers gain more self-confidence, improve their decision-making skills, and learn assertive communication.
 - ❖ Better Emotional well-being
 - Participants explore and learn how to deal with difficult emotions such as guilt.
 - ❖ More Self-care behaviors
 - The importance of practicing good self-care and strategies to help a caregiver do that.
- *PTC* is presented in six sessions that meet once a week for either **1 ½, 2, or 2 ½** hours in a community setting such as a hospital, senior center, library, community center, church, etc.
- Topics include:
 - Week 1: Taking care of YOU
 - Week 2: Reducing Personal Stress
 - Week 3: Communicating Feelings, Needs, and Concerns
 - Week 4: Communicating Effectively with Others
 - Week 5: Learning from our Emotions
 - Week 6: Mastering Caregiving Decisions

Benefits to Caregivers:

- Caregivers can take better care of their loved one when they feel more confident and take better care of themselves.
 - Workshops are convenient; with times to fit all types of caregivers, held at various time of the year in different areas of the county.
 - *PTC* is a credible educational resource – has been studied and proven to have positive results.
 - *PTC* is low-cost – most workshops are only \$[FEE]. Scholarships are available for those who cannot afford the registration fee.
 - Caregivers learn what community resources are available and how to access them.
- Benefits to [INSERT NAME OF MEDICAL CENTER]
- *Powerful Tools for Caregivers* represents a valuable, proven resource your health care system can rely on to support caregivers who will provide the follow-up care once a patient is discharged from the hospital.
 - Can be part of an overall program to enhance patient compliance after discharge.

- Fits with the medical center’s mission to provide a seamless continuum of patient care.
- Is a cost-effective way to create awareness for your hospital’s services in the community.
- An opportunity to collaborate with community agencies and organizations.

Powerful Tools for Caregivers is sponsored by: **[INSERT NAME OF AGENCY]**

For more information contact:

[NAME, TITLE]

[PHONE]

[EMAIL]

Promoting Your Workshop: Resources on WIHA Website

These materials are available on the Wisconsin Institute for Healthy Aging website (<http://wihealthyaging.org>) in the Provider/Leader Login section for *Powerful Tools for Caregivers*.

You must have login credentials (LOGIN and PASSWORD) to access these materials. All active WIHA *PTC* Program Leaders and Program Providers have been sent their LOGIN and PASSWORD. If you do not have these credentials, please contact WIHA at info@wihealthyaging.org.

These materials can help you let people in your community know about and register for your *PTC* workshop: Marketing Tool Kit

Marketing Materials

- Ticket for Workshop Registration (template)
- WIHA *PTC* brochure (template)
- First Sample Flyer (template)
- Second Sample Flyer (template)
- Recruitment Letter from Community leader (template)
- Tell a Friend Letter (template)
- Prescription Pad for Health Care Providers (template)
- Informational Letter to Health Care Provider (template)
- Program Cover Letter to Health Care Provider (template)
- Provider Recommendation Form (template)
- Participant Testimonial
- News Releases (template)
- Newsletter Article (template)

***Powerful Tools for Caregivers* website** – www.powerfultoolsforcaregivers.org

- Where to buy books, CDs
- Bibliography on *PTC*
- Websites on Caregiving

VI. References

Endnotes

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