

Best Practices of Caregiver Consultation

Below are the Best Practice Standards for Caregiver Consultants. These standards were last modified in April of 2025 and may be updated periodically as needed. The purpose of these standards is to ensure high quality and consistent services are delivered by Caregiver Consultants in Minnesota.

Ethics and professional values

Caregiver Consultants have knowledge of ethics and practice according to the ethical guidelines, principles and standards of their discipline and setting (e.g. NASW Code of Ethics).

This includes:

- Primacy of client needs and self-determination.
- Clearly communicating the distinctions between coaching, consulting, psychotherapy and other support professions
- Referring clients to another support professional as needed, knowing when this is needed and the available resources.
- Meeting privacy and confidentiality standards – must comply with local, state, and federal mandates related to confidentiality and privacy of client information.
- When dealing with confidential information, using professional judgment to consider ethical and legal implications (including HIPAA).
- Being trained as a mandated reporter per the Minnesota Vulnerable Adults Act.

Cultural Awareness/Responsiveness

Caregiver Consultants have knowledge and respect for the history, traditions, values, and family systems of client groups, as they relate to home and community-based services, health care services and decision making. Caregiver Consultants adapt standards of practice to meet cultural norms and values.

This includes:

- Knowledge, competency and skills to work with individuals and families from a variety of communities including, but not limited to, communities of color, American Indians, Alaska Natives, veterans, LGBTQ+ communities, and persons with disabilities.
- Skills to meet the needs of individuals and families with disabilities, and lesbian, gay, bisexual and transgender individuals who are caregiving.

- Awareness of disparities and barriers across cultures and economic groups in gaining access to and funding for home and community-based and health care services.
- Taking responsibility for self-reflection regarding the impact of their personal cultural beliefs on their professional and personal life.
- Understanding of the intersectionality of historical trauma, cultural beliefs, self-identity, gender, etc.
- Understanding of the community system and knowledge of specific cultural resources available.
- Committing to ongoing education and knowledge of the resources for new subsets of populations.
- Culturally responsive care, including but not limited to, creating a culturally safe environment, using cultural negotiation, and considering the impact of culture on patients' time orientation, space orientation, eye contact, and food choices.

Knowledge Base

Caregiver Consultants have a working knowledge of current best practices. They keep current on emerging knowledge and trends and integrate this knowledge into practice.

This includes:

- Basic knowledge of family systems and family dynamics.
- Basic knowledge of common chronic illnesses and/or conditions.
- Understanding of Alzheimer's disease and related dementias, management of behaviors and communication, and community resources/referrals.
- Assuming personal responsibility for continuing professional education according to standards of their discipline and setting (e.g. geriatric nurse practitioner).
- Participates in professional development training by the MBA or a designated contractor (annually or as offered).

Assessment

Caregiver Consultants gather information regarding the caregiver/client's situations to create a comprehensive plan. These assessments establish trusting relationships between the consultant and the caregiver.

Consultants completing assessments should:

- Ask questions and probe for clarification.
- Uses strength-based person-centered and family-centered approach.
- Address principles and seven domains of caregiver assessment developed by the Family Caregiver Alliance.

Goal setting, intervention, planning and follow-up

Caregiver Consultants facilitate the development and implementation of a self-directed action plan with client.

This can include:

- Using problem-solving techniques and coaching tools and strategies.
- Providing ongoing education, building self-advocacy skills and providing support.
- Assisting caregivers in evaluating outcomes and modifying the plan.
- Obtaining ongoing feedback from caregiver on process and plan.

Supporting Self-Advocacy

Caregiver Consultant teach caregivers systems navigation and self-advocacy skills needed to fulfill the plan.

This can include:

- Advising about navigating between health and long-term services and supports.
- Teaching self-advocacy skills, such as communicating needs, identifying, and resolving problems and making decisions related to the care, provider services and benefits, as caregiver is able and willing.
- Developing collaborative relationships with other health, mental health, and allied health professionals, and transfers these relationships to caregiver as able and willing.
- Striving to enhance inter-professional, intra-professional, and interagency cooperation on behalf of the caregiver.

Documentation/Information Movement

Caregiver Consultants maintains records and provide information updates to persons who need to know.

This includes:

- Maintaining records or documentation of caregiver services reflecting pertinent information for assessment, interventions, and outcomes in accordance with administrative policies within their organization.
- Complying with privacy and confidentiality standards including obtaining release of information forms.

This can include:

- Instructing caregivers about how to organize and manage essential information (e.g., records, prescriptions, treatments, benefits, financial information, advanced directive, power of attorney for health care).
- Facilitating the flow of information between all “care team” members.
- Communicating with a caregiver’s physician to ensure that there is a caregiver designation in the caregiver’s medical record and provide updates to the medical care team as to the health and mental health status of the caregiver as agreed upon (with permission).

Performance Improvement

Caregiver Consultants conduct ongoing, formal evaluations of their practice to assess quality and appropriateness of services, to improve practice and to ensure competence.

This includes:

- Monitoring caregiver health and wellness through the caregiver plan with goals (e.g., stress, depression, and other wellness measures)
- Incorporating individual feedback into plans on an ongoing basis
- Incorporating feedback from client satisfaction surveys and other methods into service components.