

## Family Meeting Checklist

### Set Up

- ◆ Prepare handouts, writing aids, refreshments
- ◆ Include long-distance participants via conference call, Skype, etc.
- ◆ Arrange seating to ensure that all can see and hear each other

### Welcome, Introductions, Orientation to meeting, Establish rapport

- ◆ Give thanks to everyone for attending
- ◆ Acknowledge possible tension—take collective breath to center
- ◆ Introduce self and agency protocol for working together. Invite others to introduce themselves and state their role
- ◆ Review ground rules; request no interruptions from electronic devices
- ◆ Indicate the duration of meeting

### Review the Agenda

- ◆ Outline broad purpose of family meeting and confirm with family members. For example: ***"From the things you mentioned on the questionnaire what is the most important thing you would like to discuss?"***
- ◆ ***The goal is to "get everyone on the same page" on behalf of the person who is ill and to support the primary caregiver***
- ◆ Define the issues and problems at hand-both short and long-term
- ◆ Prioritize agenda with no more than five concerns/issues

### Begin the Discussion

- ◆ Begin by reviewing and creating shared knowledge base about medical needs and diagnoses. **Share medical reports and doctor's notes with treatment recommendations, medications, prognosis, etc.**
- ◆ It may be helpful to review the daily routine that shows a typical day of caregiving so that other family members get a practical sense of what is involved
- ◆ Share perspectives, options; educate about resources

### Facilitator skills

- ◆ Encourage and balance participation
- ◆ Empathic listening to build trust and establish commonalities

- ◆ Ask good questions- circular, strategic, reflexive
- ◆ Clarify how family members are coping and feeling emotionally.
- ◆ Seek ways to ensure that care receiver feels a sense of involvement and control over their destiny by giving them the opportunity to express their opinions and take part in making decisions
- ◆ Check out your impressions of discussion by summarizing frequently
- ◆ Use humor to ease tension and strengthen working relationship

#### Remember to

- ◆ Encourage expression of all views and feelings. Label feelings and help to express in nondestructive ways
- ◆ Offer relevant written resources-guidebooks, brochures, advance care directive information, etc.
- ◆ Check in regarding legal and financial concerns
- ◆ Assist to develop back-up plan and/or review crisis management plans
- ◆ Who will do what? Recognize that help can be given in many ways, hands-on, financial or emotional All are valuable

#### Summarize and End the Meeting

- ◆ Summarize any areas of consensus, disagreements, decisions and the ongoing plan and seek endorsement from attendees
- ◆ Put decisions in writing and fill in the calendar
- ◆ Emphasize positive outcomes
- ◆ **Offer more time for questions, concerns or comments: "What hasn't been covered today that you would have like to discuss?"**
- ◆ Identify one family spokesperson for ongoing communication.
- ◆ Verbalize appreciation of the willingness of the family members to attend the meeting and foster support for the caregivers
- ◆ Follow-up? How to keep in touch?