

# Case Study: WellMed Charitable Foundation's Caregiver SOS Program

A Model for Evidence-Based Caregiver Support and Education

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“The WellMed Care Model is a patient-centered approach to preventive primary care, and recognizes the need to surround the patient with an array of supportive services, including caregiver support.”

*Carol Zernial, Executive Director, WellMed Charitable Foundation*

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## BACKGROUND

The WellMed Charitable Foundation, the non-profit partner of primary care group WellMed Medical Management, provides a range of free services to support and empower family caregivers of people living with dementia and other chronic conditions. WellMed's program, called Caregiver SOS, provides caregivers of WellMed patients and others in the community with three core services: a coaching program, teleconferences with experts, and stress reduction training. The program was launched with the understanding that empowering and supporting caregivers can improve the quality of care for patients, reduce emergency department and hospital visits, delay nursing home placement, and reduce stress for caregivers.

The WellMed Charitable Foundation was established in 2006 by Dr. George Rapier, the founder and Chief Executive of WellMed Medical Management. The Foundation's mission is to support programs that serve seniors and their family caregivers, with a special focus on living well with chronic conditions.

## IN BRIEF: DEMENTIA CARE AT WELLMED MEDICAL MANAGEMENT

**Program Name:** Caregiver SOS

**Institutional Home:** WellMed Medical Management is one of the largest primary care groups in the U.S., serving a Medicare Advantage population of over 350,000 patients. Caregiver services are offered by the WellMed Charitable Foundation, the non-profit partner of the medical practice.

**Location:** Texas (San Antonio, Austin, Corpus Christi, Dallas/Fort Worth, El Paso, and Lower Rio Grande Valley) and Florida (Miami, Treasure Coast, Tampa/St. Petersburg, Orlando)

**Patient Population:** Caregiver SOS targets any family caregiver of a person with dementia at any stage, as well as caregivers of patients enrolled in palliative care.

The program engages approximately 180 new caregivers each year per Caregiver Specialist.

**Caregiver support:** Caregiver coaching, caregiver teleconferences, and stress reduction training

**Staffing Model:** Caregiver SOS program staff consists of a Program Manager, 5 Caregiver Specialists, and a Program Coordinator. Caregiver Specialists are trained and certified in the BRI Care Consultation program and other evidence-based programs.

**Funding Model:** All services are provided at no charge, funded by the WellMed Charitable Foundation and contracts with the Area Agencies on Aging in Texas.

## APPROACH

Caregiver SOS offers caregivers 3 core services: coaching, teleconferences with experts, and stress reduction training.

The first core service offered by Caregiver SOS is the coaching program, which provides caregivers with 12 months of in-person and telephone-based coaching using the BRI Care Consultation model, an evidence-based intervention developed by the Benjamin Rose Institute in Cleveland, OH.<sup>1</sup> The program emphasizes the importance of empowering families so they are actively involved in managing care and decision making. The BRI Care Consultation model has been shown to improve satisfaction with care and to reduce unmet needs, stress, and costly emergency room visits and readmissions. Licensing, training, and technical support for the program are provided by the Benjamin Rose Institute on Aging. Caregiver Specialists receive 3 hours of training on program delivery via webinar from the Benjamin Rose Institute. Caregiver SOS supplements this with some in-person training from the program supervisor.

The BRI Care Consultation program consists of three standard elements: (1) assessment, (2) action planning, and (3) ongoing maintenance and support. In the assessment phase, Caregiver Specialists use a triage method to identify the caregiver's most pressing needs. A panel of assessment questions is completed over the course of several conversations in the first 4 months, providing time for Caregiver Specialists to focus on education and address the most pressing problems on any given visit. Caregiver Specialists use the assessment to develop personalized, simple, and achievable action plans for the caregivers. These plans include specific actions the caregiver can take to address their challenges themselves. This could be anything from education about how to handle dementia-related behaviors to information about insurance or legal options, or ways to develop communication skills so that caregivers can advocate effectively for their loved one. Caregiver Specialists follow up on action plans and offer ongoing encouragement and coaching. Reassessment is conducted after the fourth month to capture any changes and the need for the new action steps.

Each Caregiver Specialist works with approximately 180 new caregivers per year. The BRI Care Consultation program sets a recommended schedule of contacts with

caregivers, though more regular contact is made when needed. The schedule calls for Caregiver Specialists to be in contact 3 times within the first month (an initial call, a second to start the action plan, and a follow-up phone call). The next follow-up call is scheduled for the two-month mark, and further calls are every 3 months thereafter. More calls will be made in between scheduled calls if needed. Caregiver Specialists can track their calls, record caregiver information, and run reports on quantitative metrics using software provided with the BRI Care Consultation license, the Care Consultation Information System.

The second core service offered by Caregiver SOS is telephone-based caregiver education and support through Caregiver Teleconnection, a series of free teleconferences hosted by experts 3-4 times a month. Interested caregivers can dial into teleconferences to receive advice from doctors, lawyers, social workers, and other caregivers. Callers can remain anonymous. The program is scalable with the potential to reach hundreds of caregivers at a time, at minimal cost. To further expand the program's reach, Caregiver SOS recently began recording the conferences and posting recordings online.<sup>2</sup>

The third core Caregiver SOS service is a series of evidence-based stress reduction training courses for caregivers, called the Stress-Busting Program.<sup>3</sup> Courses are 9 weeks long and delivered to small groups of up to 8 people by 2 trained facilitators. In weekly 90-minute sessions, caregivers learn stress management and relaxation techniques, and how to cope with dementia-related behaviors and chronic illness. The program, which was originally developed at the University of Texas Health Science Center in San Antonio, is proven to reduce stress, anxiety, and depression, and to improve quality of life for family caregivers. The program has grown to a suite of courses for caregivers of people with dementia, Spanish-speaking caregivers of people with dementia (this course is a true cultural adaptation, not simply a translation), caregivers of people living with chronic illnesses, and professionals who are dealing with compassion fatigue and burnout. Caregiver Specialists receive 2 days of training to deliver the original program, with half-day cross-training sessions for the various adaptations. Specialists deliver the Stress-Busting Program 2-3 times per year. Participants fill out pre- and post- evaluations of the program, which measure the participant's level of perceived stress, depression, and caregiver burden. The results of these evaluations are tabulated and compared to the original research to ensure the program is being delivered as intended.

WellMed clinics are encouraged to refer family caregivers of patients with diagnosed and undiagnosed dementia to Caregiver SOS. Referrals to the program can be made in the care recipient's electronic health record (EHR) by any member of clinic staff. The WellMed home-based palliative care team developed a work flow that communicates the availability of the Caregiver SOS program to the caregivers of their frailest patients, around 60% of whom are individuals with dementia. The most important aspect of integrating caregiver services into palliative care has been to incorporate the protocols into existing processes, says the program's Executive Director. Caregiver SOS services are available Monday to Friday during business hours, with occasional evening and weekend events and support groups.

## RESULTS TO DATE

In 2017, Caregiver SOS served 933 new caregivers in its coaching program, and 80 caregivers completed the Stress-Busting Program.

WellMed succeeded in replicating the clinical findings of the Stress-Busting Program during a grant awarded through the Administration on Community Living. Caregivers who participated in the stress-busting program showed statistically significant improvements in levels of depression, stress, caregiver burden, and quality of life. The improvements were sustained when caregivers were re-evaluated two and four months later, indicating that caregivers learned how to incorporate the strategies into their lives. WellMed is beginning to collect data on outcomes of the BRI Care Consultation program as part of its partnership with the home-based palliative care team.

The program continues to grow as WellMed moves towards a telephone-based system to achieve scale. This has helped to reduce the cost per caregiver from \$600 per year to between \$170-\$220 per year. Caregiver SOS has not measured whether its caregiver interventions have contributed to reductions in health care spending for care recipients.

## TOOLS

- Caregiver SOS uses the BRI Care Consultation coaching program, a caregiver support program licensed by the Benjamin Rose Institute on Aging.
- The BRI Care Consultation Program license includes the use of a web-based information management system called the Care Consultation Information System (CCIS). The CCIS documents information on caregivers and care recipients, and guides the evidence-based components of the program. Program managers can use the CCIS to review fidelity to the intervention with regular reports.
- WellMed Medical Management includes caregiver referrals to Caregiver SOS in its EHR, eClinicalWorks.

## LESSONS LEARNED

- **Provide accessible support services:** The Caregiver SOS program began with a social model of support groups based in community centers, but the demands of caregiving meant that many caregivers were unable to attend in-person meetings. Caregiver education and support must be available through multiple channels: in person, over the phone, and via computer. The coaching program is moving to a telephone-based system to improve access and to scale the program to caregivers across all WellMed service areas.
- **Consider your referral stream:** The program's medical partner, WellMed, wanted caregiver supports to use evidence-based practices that could be measured, prompting a redesign of Caregiver SOS services to include the Stress-Busting Program for Family Caregivers in 2011, and the adoption of the BRI Care Consultation Program in 2015. The caregiver referral was added to the EHR in 2017.

- 1 For further information on the BRI Care Consultation program, visit <http://www.benrose.org/bricareconsultation/>.
- 2 Caregiver Teleconnection recordings are available at <http://caregiversos.org/caregiver-teleconnection/caregiver-teleconnection-on-demand/>.
- 3 For further information on the Stress Busting program, visit <http://www.caregiverstressbusters.org>.

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