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# Caregivers, Social Workers and Assessment: The role of expectations

**Norma Gilbert, PhD candidate**  
Sciences humaines appliquées,  
Université de Montréal  
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Thesis title

The Social and Interpersonal  
Dimensions of Measuring  
Loss of Autonomy:

Expectations among Family  
Caregivers and Home Care Social  
Workers in Québec

# Introduction

- Context of the research
  - Research question and method
- The meaning of autonomy
- Family caregivers expectations for care and services
- Social workers expectation of caregivers
- Organizational expectations of social workers
- The intersection of expectations
- Conclusion

# Context of the research

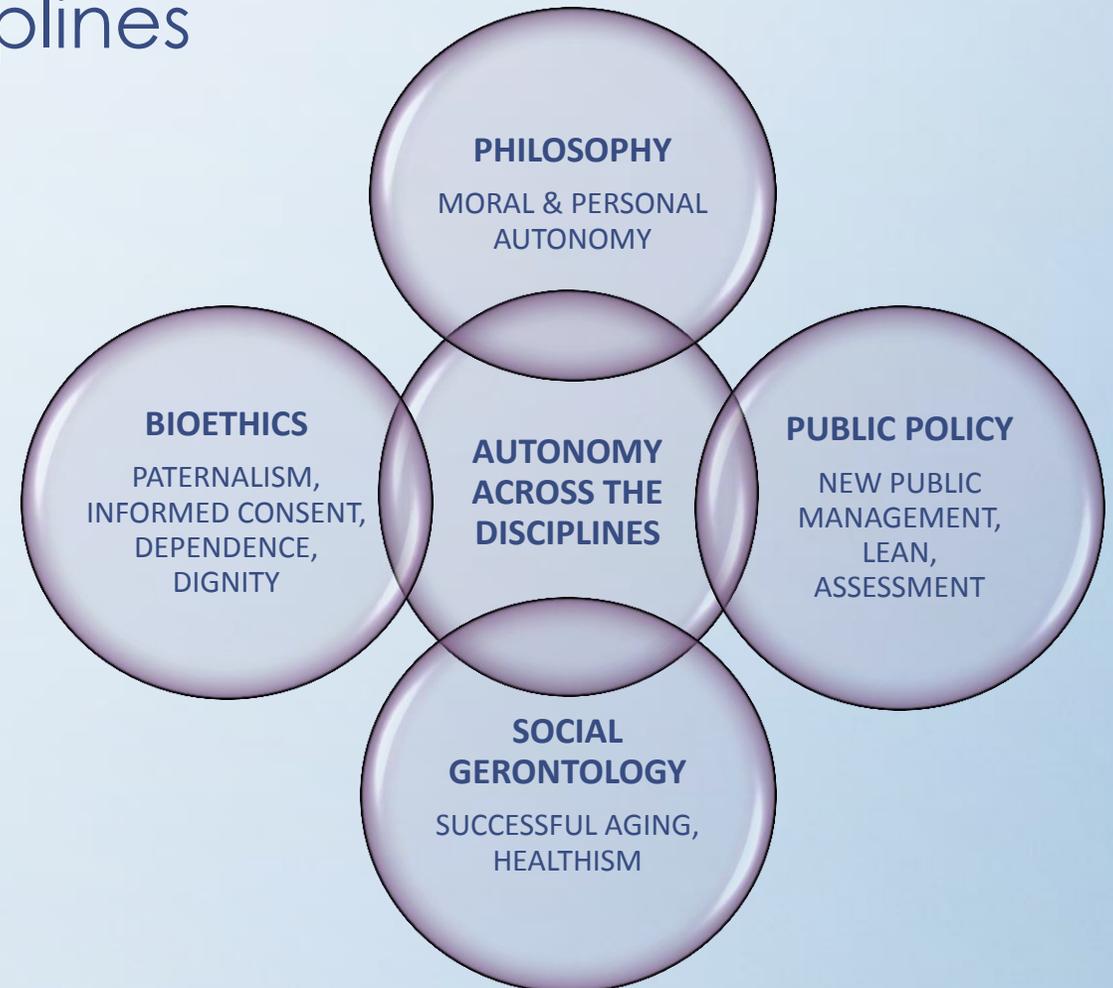
- Problematizing loss of autonomy
  - Alarmist predictions of the aging population impact on healthcare
  - Deficit-based assessments
- Aging, loss of autonomy and expectations for care
  - Caregivers navigating the healthcare world
  - Social workers balancing organizational expectations and caregiver's expectations

# Research question and method

- How do family caregiver's, social worker's and the health care system's expectations influence the standardized assessment of functionality and autonomy of elderly home care clients and how does the assessment influence expectations?
- Method
  - Interviews with family caregivers
  - Discussion group with caregivers
  - Interviews with homecare social workers
  - Documentation search

# The meaning of 'autonomy'

- 'Autonomy' across the disciplines
  - Philosophy
    - Self rule, free choice
  - Bio-ethics
    - From 'Doctor knows best' to informed consent
  - Social gerontology
    - Successful aging, healthism
  - Public policy
    - Austerity, time management



# Family caregiver's expectations for care and services

- Sources of expectations
- Types of expectations
- Loss of autonomy
  - Personal meanings

# Types of expectations

## Caregiver's expectations

**None.** "I didn't know what to expect"

**To be treated as 'expert.'** "I have power of attorney, I pay my taxes, it should be my decision."

**Information.** "I need to know about resources and where I can get more help."

**Care at home (services).** (e.g. washing, cleaning, shopping, dressing)

**Support for themselves.** (counseling, groups, respite)

**Placement for relative.** "I couldn't do it anymore" "They decided for me"

# The meaning of 'loss of autonomy' for caregivers

- The 'rebound' or 'mirror' effect of autonomy loss

*“Loss of autonomy means loneliness and making the decisions. Before you were making the decisions with your husband and now you have to make the decisions yourself.”*

*“It’s like saying I’m a widow with a husband. What’s worse? A widow without a husband or a widow with a husband? It’s sad. It really is.”*

# Social workers: assessment and expectations of family caregivers

- Assessment of elderly
  - The OEMC
  - The psychosocial assessment
- Types of expectations
  - Personal values and systemic protocols
- Problematizing the role of family caregivers
  - “They are our partners, until we burn them out”

# Assessment (OEMC)

- **In general, SW had a positive opinion of the instrument,** *“It’s a good tool...but, It’s a snapshot.” “The OEMC is not really a dynamic portrait of the person’s autonomy; it’s how they are at their worst.”*
- **The resulting ‘score’ is not always consistent with the reality of the client,** *“The score is important, too important maybe. So you really want it to be reflective of the client’s reality because it influences your ability to get services and it influences your ability to get into residential care. So there’s a lot riding on that number”*
- **There is not much place for assessing the family caregiver,** *“There’s nowhere to say it on the form that the person who’s compensating is actually having trouble or is overwhelmed...”*
- **They made some recommendations for improvement of the instrument. ;** *“I would make it systematic that you would do an evaluation with the client and then you would also have time to do an evaluation with the caregiver”*

# Social workers expectations of caregivers

**Reporters** social workers expect that family caregivers will be their “eyes and ears on the ground” Because the “...family has much more of a view of the situation than I do” and to “... keep me in the loop of any changes.”

**Information givers** “the caregivers have ... a tendency of speaking for but ... they are also a wealth of information”

**Resources** “I think right now when the worker goes to do an evaluation I think they look at the caregiver as a resource.”

**Compensators** “They’re coerced into doing that stuff. And at the cost of their own health, at the cost of their financial well-being and their personal development.”

**Help seekers** “The caregivers ....sometimes have higher demands than the client because they’re the one compensating. They need to understand they are not our first priority. They ask a lot but they don’t know what they want.”

# Organizational expectations of social workers

- LEAN protocols and government austerity
  - Budgets, waitlists, ....
- Expectations – the 3 P's
  - **Productivity** – *“I think it’s all about the numbers. Sometimes I wish that I had been around the table when they kind of decide on say, more visits.”*
  - **Performance** - Case management, supervision, statistics, leadership
  - **Professionalism** – ethics, confidentiality, judgement, training

# The changing role of social workers

*“Don’t get me wrong. I wish I could do just 7 hours of seeing clients. That’s what I was trained to do, I was trained to do clinical work. To meet clients and help them resolve their issues to help them advocate. But there’s that big beast that needs to be fed. There’s charting, there’s a need to produce stats. In filling out reports, the stats and the number of home visits. Well you can’t do 10 home visits a week and do all the charting. It’s impossible. It’s achievable in the short term but it’s not maintainable.”*

# The changing role of social workers

*“New arrival social workers seem to be overwhelmed by the complexity of the system. The grind is tough and it’s hard to maintain. They go on the treadmill and it’s hard to keep up with the demand. The new OCCL [the successor instrument to the OEMC] is longer, it’s going to involve more paperwork, more numbers and more stats.”*

<b>Management expectations of Social Workers</b> (working climate of austerity and budget constraints)	<b>Social Worker's expectations of family caregivers</b> (Givers of care)	<b>Family caregiver's expectations of Social Workers</b> (Receivers of care)
<b>Professionalism</b> - training - ethics - judgement <b>Productivity</b> - case management - time management - efficiency - adaptability <b>Performance</b> - team work - leadership - trust	<u>For caregivers to be:</u>  Reporters  Information givers  Resources  Compensators	No expectations  To be treated as an 'expert'  To receive information about resources  <b>To get home care services for their relative</b> (Services lacking or being cut along with the continuous deterioration of their relative)
<i>Introduction of new assessment tool (OCCI)</i> (2018-2019)	Help seekers	<b>To have care and support for themselves</b> (Lack of caregiver support in the system)  <b>To have their relative go into long term care</b> (Long waiting lists, shortage of beds)  <b>CAREGIVERS BECOME CLIENTS</b>

# Conclusion

- Loss of autonomy and aging
- The 'clientization' process
- Implications for practice?

*Thank-you!*

