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Helping Seniors Get Things Done

Task Identification & Assignment Guide
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Fast Start

Carmen and I want to give you a starting point so you can begin a challenging process. We believe it offers you three critical advantages over what you're likely to do without it. One, it's an objective source to use with your family. Most families have histories that make it difficult to do anything unemotionally. Two, it helps you break down projects into tasks so the right person is assigned a task they can do. For example, driving Mom to the cancer specialist is very different than being able to accurately transcribe what the specialist said and ask good questions about the implications of their diagnosis. Driving and understanding a serious disease diagnosis are two different tasks. Third, staying objective (trying to get the right kind of help from the right person) is more likely to optimize your limited resources.

The program presented below is for family and casual helpers (neighbors, church members, etc.). Professional caregivers, or those with years of experience, can do lots of tasks.

A BRIEF SUMMARY OF HOW WE ASSIGN TASKS

Carmen and I learned in our corporate careers that if you know what you're trying to do and get the right person to do it, you have a high probability of success. One of the best tools to identify what a person is good at is their chosen occupation. For four or five decades, scientists have been testing how your personality is tied to what you do. In other words, the profession you choose and your personality type are aligned.

IDENTIFYING WHAT YOU ARE GOOD AT

CarePlanIt helps allocate tasks using something called Holland Codes (personality types) and the chosen occupations of those personality types. For example, a person who likes working outside and doing things is someone that might become a carpenter. Asking a carpenter to do home maintenance makes more sense than asking a carpenter to evaluate cancer specialists.

WHAT DO SENIORS NEED HELP WITH?

Carmen and I discovered in our interviews and research that aging seniors need help doing very similar things. In other words, the tasks they need help with fall into common categories. They are:

MEDICAL RELATED

Medical-related tasks are things involving doctors, physical therapists, doctor diagnoses, and treatments. This category of tasks is not concerned with the Senior's day-to-day activities, or general ability to function independently. Specifically, the medical-related tasks include:

- ✓ choosing a medical approach (traditional, Eastern, alternative, etc.)
- ✓ picking a doctor
- ✓ determining the necessity of a second opinion
- ✓ evaluating diagnosis and treatment protocols
- ✓ examining the effects of the disease on the Senior
- ✓ examining the effects of treatments & medication on the Senior (does their health decline or improve, etc.)
- ✓ appointment management.

ADLS & IADLS

- ✓ examining a Senior's abilities from an ADL & IADL perspective
- ✓ examining a Senior's spouses abilities from an ADL & IADL perspective
- ✓ examining what the spouse can do for the Senior from an ADL & IADL perspective
- ✓ help needed by the Senior from an ADL & IADLS perspective

HOUSEHOLD ISSUES

- ✓ evaluating the house for safety (i.e. minimizing Senior injuries)
- ✓ evaluating remodeling and retrofitting needs

- ✓ identifying new senior housing options
- ✓ evaluating new senior housing options
- ✓ taking senior to visit new housing options

TAKING SENIOR TO VISIT NEW HOUSING OPTIONS

- ✓ bill
- ✓ bill
- ✓ pov

SOCIAL

- ✓ ider
- ✓ pro

PETS

- ✓ ens
- was
- ✓ ider

FAMILY

- ✓ ider
- nee

CARE

- Ide
- Inv
- Sch
- List
- Ob

- Pe
- Ac
- Ati
- Im
- W

house

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It's not meant to be perfect. It's intended to get you thinking about ways to quickly categorize tasks so you can better assign them to people but it gets you started.