



Family Care Meeting Worksheet

A Brightway Aging Advocacy Resource

A calm place to organize the conversation

Use this worksheet before, during, and after a family care meeting.

The goal is not to pressure anyone into a perfect decision. The goal is to slow things down, name the concerns, listen to what matters, and leave with clear next steps.

Meeting Snapshot

Date:	Time:	Location / video link:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Facilitator:	Note taker:	Follow-up date:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Main purpose for meeting:		
<input type="text"/>		

Who Should Be Included

Name	Relationship / role	Phone / email	What they need to share
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Meeting Ground Rules

Choose a few agreements before the conversation begins.

- | | |
|---|--|
| <input type="checkbox"/> Listen before responding | <input type="checkbox"/> Pause if emotions run high |
| <input type="checkbox"/> Keep the older adult at the center | <input type="checkbox"/> Separate facts from assumptions |
| <input type="checkbox"/> Use respectful language | <input type="checkbox"/> Leave with clear next steps |

Other agreement:



Family Care Meeting Worksheet

A Brightway Aging Advocacy Resource

Concerns and current situation

Start with what has changed, what feels uncertain, and what needs attention first.

What Prompted This Meeting?

Changes or Concerns Noticed

Check anything that applies. Use the notes area for details, examples, or dates.

- | | | |
|--|--|--|
| <input type="checkbox"/> Falls or near falls | <input type="checkbox"/> Medication confusion | <input type="checkbox"/> Memory or judgment changes |
| <input type="checkbox"/> Driving or transportation | <input type="checkbox"/> Meals or hydration | <input type="checkbox"/> Bathing or hygiene |
| <input type="checkbox"/> Mobility or stairs | <input type="checkbox"/> Loneliness or isolation | <input type="checkbox"/> Caregiver stress |
| <input type="checkbox"/> Bills or paperwork | <input type="checkbox"/> Home safety | <input type="checkbox"/> Legal or planning documents |

Facts We Know So Far

Recent events, appointments, hospital visits, calls, or changes:

Open Notes About Concerns



Family Care Meeting Worksheet

A Brightway Aging Advocacy Resource

Priorities, preferences, and values

Good care planning starts with what matters most to the person receiving care.

What Matters Most to the Older Adult?

Use their words whenever possible.

Priorities to Balance

- | | | | |
|--|---|---|--|
| <input type="checkbox"/> Safety | <input type="checkbox"/> Independence | <input type="checkbox"/> Comfort | <input type="checkbox"/> Privacy |
| <input type="checkbox"/> Staying at home | <input type="checkbox"/> Family involvement | <input type="checkbox"/> Budget | <input type="checkbox"/> Social connection |
| <input type="checkbox"/> Pets | <input type="checkbox"/> Faith / routines | <input type="checkbox"/> Transportation | <input type="checkbox"/> Medical follow-up |

Must-Haves

Concerns or Limits

Questions We Need to Ask Before Deciding



Family Care Meeting Worksheet

A Brightway Aging Advocacy Resource

Options, decisions, and next information needed

Use this page to compare ideas without rushing to an answer.

Options Discussed

Option	Possible benefit	Concern / barrier	More info needed

Decisions Made Today

Only write a decision here if the family agrees that it is actually decided.

Not Decided Yet

Who Needs to Be Consulted?



Family Care Meeting Worksheet

A Brightway Aging Advocacy Resource

Action plan and follow-up

Turn the conversation into simple, visible next steps.

Next Steps

Task / next step	Person responsible	Due date	Status / notes

How We Will Communicate Updates

- Group text Email Shared document Phone tree Weekly check-in One point person

Details:

Follow-Up Meeting or Check-In

Date:

Time:

Location / link:

What must be reviewed at follow-up?



Family Care Meeting Worksheet

A Brightway Aging Advocacy Resource

Roomy meeting notes

Use this page for anything that does not fit neatly into a box.

Open Meeting Notes

Questions to Ask Professionals

Documents to Gather

Gentle Next Step

Choose one small step each person can take before the next check-in.

About Brightway Aging Advocacy

Brightway Aging Advocacy supports older adults and their families in navigating the complexities of aging with clarity, compassion, and confidence. From home safety guidance to care coordination and advocacy, we are here to help you make thoughtful, informed decisions every step of the way.