

SELF-CARE WORKBOOK FOR

Family Caregivers

A PRACTICAL GUIDE TO IMPROVING PHYSICAL, MENTAL, SOCIAL AND FINANCIAL HEALTH



AARP[®]

Family Caregiver



WELCOME

Dear Family Caregiver,

Caring for a family member or close friend can bring moments of joy and a sense of purpose. It can also impact your own well-being. This guide is designed to help you take care of yourself while you provide care for others.

You may use it to focus on your physical, mental, social, or financial well-being. Choose to go through the guide from start to finish or select the section that is most relevant to you right now.

Throughout this workbook, you'll find special tips for working family caregivers. Seven in ten caregivers aged 18-64 work full or part-time, and only half tell their supervisors about their family caregiving responsibilities.¹ Two-thirds of them expect to have trouble juggling work and caregiving.² It can be stressful to juggle it all. We hope this guide helps you develop strategies for how to ask for and use the support available to you.

We hope you'll find up to 15 minutes on most days to use this guide to manage your self-care. The worksheets can help you achieve small wins to enhance your own well-being. They have links to resources you can use and encourage you to celebrate along the way.

As a family caregiver, you are key to AARP's mission to empower people to choose how they live as they age. We appreciate all that you do.

¹ 2020 data from https://www.caregiving.org/wp-content/uploads/2020/08/AARP1316_ExecSum_CaregivingintheUS_508.pdf

² 2020 data from https://www.caregiving.org/wp-content/uploads/2020/08/AARP1316_ExecSum_CaregivingintheUS_508.pdf



Contents

Prioritizing self-care 4

Visualizing My Future 5

Physical Well-Being 6

The Power of a Partner

Mental Well-Being 8

The Power of a Partner

Social Well-Being 10

The Power of a Partner

My Financial Well-Being 12

The Power of a Partner

Celebrate Progress 14



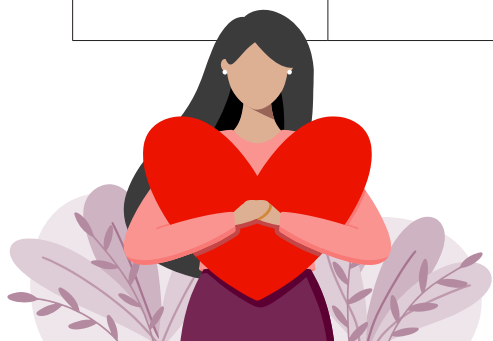
Prioritizing Self-Care

Caregiving can bring purpose, meaning, and strengthen relationships. It may also create strain and impact many aspects of caregivers' lives, including these four aspects of well-being: physical health, mental health, social health, and financial health. When caregivers prioritize their own health, it can also have a positive impact on the well-being of their care recipients.

What makes it easier or harder for me to prioritize my own well-being?

Take three minutes to brainstorm about my current situation: What do I feel I need to prioritize my own well-being? What creates challenges for me to prioritize it?

WHAT	WHAT DO I NEED TO PRIORITIZE MY WELL-BEING?	WHAT ARE SOME CHALLENGES WITH THIS?
My physical health		
My mental health		
My social health		
My financial health		



Think of aspects of your work life that make it easier or harder to build habits that support your well-being.

These might include examples of your organization's work culture, your work hours or schedule, how teams work together, your work style, or access to employer benefits and policies. Add some ideas to the chart above.

Visualizing My Future

Grounded in my Values

Take three minutes to reflect:

Why do I value my well-being? What version of my future could be possible when I strengthen my well-being? For example, "I value my physical well-being because I want to travel and to enjoy my own future retirement."

People are more likely to sustain their self-care habits if they have a vision of their future that motivates them to build those habits.

Choose High, Medium, or Low

to reflect your current assessment of each aspect of well-being. Choose which aspect of well-being is your priority - it's up to you!

I value my **PHYSICAL HEALTH** and well-being because...

☐ ☐ ☐

HIGH **MEDIUM** **LOW**

I value my **MENTAL HEALTH** and well-being because...

☐ ☐ ☐

HIGH **MEDIUM** **LOW**

I value my **SOCIAL HEALTH** and well-being because...

☐ ☐ ☐

HIGH **MEDIUM** **LOW**

I value my **FINANCIAL HEALTH** and well-being because...

☐ ☐ ☐

HIGH **MEDIUM** **LOW**



Finding Time for Self-Care

When might you be able to find time to do an activity that aligns with your well-being?

☐

During my **COMMUTE**

☐

As a 15-minute **RECURRING DAILY MEETING** on my calendar at the start of each day

☐

WHILE I WAIT to pick up a family member for care, school, or activities

☐

Other: _____

Take three minutes to reflect:

Where in my day might I find 15 minutes to use this guide? If possible, can I look for a time during the business day when I can make calls to medical, financial, or mental health providers?

Physical Well-being

Family caregivers may delay their own personal health care needs and appointments. At the same time, the physical and emotional strains associated with caregiving tasks may exacerbate certain health conditions. While caregivers may have trouble finding time for healthy habits, small changes can meaningfully boost well-being.

The Power of Small Wins

Choosing small, incremental goals can help caregivers stay focused on progress instead of perfection and celebrate small wins to build momentum and maintain motivation.

(Check one box.)

- ☐ I'd like to focus on **SLEEP HYGIENE**.
- ☐ I want to be intentional about **MEAL PREPARATION**.
- ☐ I'd like to find 15 minutes to **MOVE MORE** each day.
- ☐ I've been meaning to **SCHEDULE A FOLLOW-UP** or referral appointment that my doctor recommended.
- ☐ I want to **BE MORE CONSISTENT** in the habits to help manage chronic condition(s).
- ☐ I'd like to learn more about **EMPLOYER BENEFITS** that could support my own physical health.
- ☐ [Choose your own]: _____

Take three minutes to reflect:

Which challenge is most important for me right now? I'll try to focus on that area this week and celebrate a small win along the way.

Take three minutes to reflect:

How can I set myself up to succeed this week?

What is a strength I can tap into? _____

What could be an obstacle? _____

How could I work through that obstacle? _____



Choose my "Small Win of the Week"

What is something I could work on this week? I'll try to find 15 minutes most days to work towards it.

Need some inspiration to choose a **SMALL WIN OF THE WEEK**?

- Read online about "**SLEEP HYGIENE**" and choose one best practice to use consistently this week.
- Keep a **FOOD JOURNAL** this week to spark ideas or gain understanding of my eating habits.
- Bundle **7 MINUTES OF MOVEMENT** into two breaks I already take during my day or between meetings.
- **MAKE APPOINTMENTS** for my medical check-ups, follow-ups, tests, and referrals.
- Ask my doctor for a **BEHAVIORAL HEALTH RESOURCE** who can support me as I manage a chronic condition.
- Explore my **EMPLOYER'S BENEFITS** and policies and draft a plan to use them.

The Power of a Partner

An accountability partner can be key to achieving your Small Win of the Week. You could choose someone who is with you when you make decisions relevant to your goals. Or someone who already models the behaviors you want. Or someone who is an expert in this area.

1

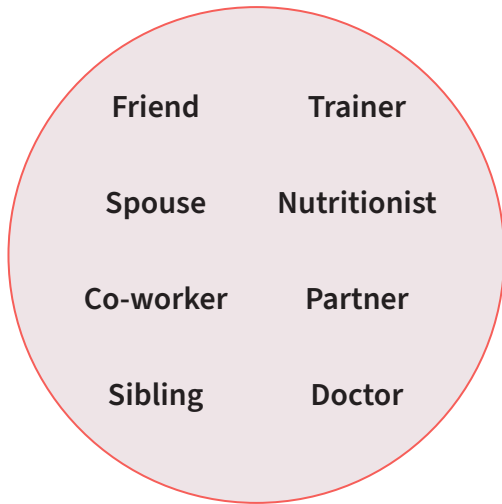
Circle the type of partner that feels best to you.

2

Write a specific name in the arrow.

3

Write something you can ask that person to do to support you.



Stuck on what to ask your partner to do?

SPOUSE/ PARTNER:

“How might we limit screens before bedtime to get better sleep?”

FRIEND:

“Which day might work for a walk/hike/exercise class this week?”

DOCTOR:

“I’d like to schedule my follow-up appointment so we can monitor my progress.”

CO-WORKER:

“What do you think of having our 1:1 meeting as a walking and talking meeting?”

Celebrate Progress

Stay motivated! For each 15 minutes you spend taking action to improve your physical well-being, fill in one block.

These AARP resources

can be helpful for family caregivers who are focusing on their physical well-being:
[AARP.org/localcaregiving](https://www.aarp.org/localcaregiving)
[AARP.org/healthyliving](https://www.aarp.org/healthyliving)



Use the call-out to celebrate your Small Win of the Week!

Mental Well-being

Family caregivers may delay their own personal health care needs and appointments. Caregiving can exacerbate some health conditions when stress increases. Caregivers may have trouble finding time for counseling sessions, mindfulness practices, and exercise.

Please remember that this guide is intended to provide general guidance. If you are in crisis, you can always reach the free, confidential Suicide and Crisis Hotline 24 hours per day by calling 988.

The Power of Small Wins

Choosing small, incremental goals can help caregivers stay focused on progress instead of perfection and celebrate small wins to build momentum and maintain motivation. (Check one box.)

- ☐ I want to focus on **SLEEP**.
- ☐ I crave some **LOW-KEY TIME** since I feel I am always “on” as a caregiver and/or at work.
- ☐ I want to experience how **PHYSICAL ACTIVITY** can improve my mental health.
- ☐ I want to set clearer **BOUNDARIES** with my care recipient, family, and/or colleagues.
- ☐ I'd like to learn more about **MENTAL HEALTH SUPPORT** in my health coverage and employer benefits.
- ☐ I'm curious about practicing **MINDFULNESS** and learning breathing exercises.
- ☐ [Choose your own]: _____

Take three minutes to reflect:

Which challenge is most important for me right now? I'll try to focus on that area this week and celebrate a small win along the way.

Take three minutes to reflect:

How can I set myself up to succeed this week?

What is a strength I can tap into? _____

What could be an obstacle? _____

How might I work through that obstacle? _____

Choose my “Small Win of the Week”

What is something I can start to work on this week? I'll try to find 15 minutes most days to work towards it.

Need some inspiration to choose a SMALL WIN OF THE WEEK?

- Discuss my **SLEEP** with a doctor.
- Set up **RESPIRE CARE** for a few hours next week and use that time for something that I enjoy.
- Ask my friends and family for ideas on how I can fit in 30 minutes of **EXERCISE** once or twice a week.
- Find a **THERAPIST** who can meet for a session to discuss setting boundaries.
- Research **MENTAL HEALTH SUPPORT** offered through health insurance, employer benefits, and community organizations.
- Research **ONLINE RESOURCES** to learn breathing and grounding techniques I can use daily.

The Power of a Partner

An accountability partner can be key to achieving your Small Win of the Week. You could choose someone who is with you when you make decisions relevant to your goals. Or someone who already models the behaviors you want. Or someone who is an expert in this area.

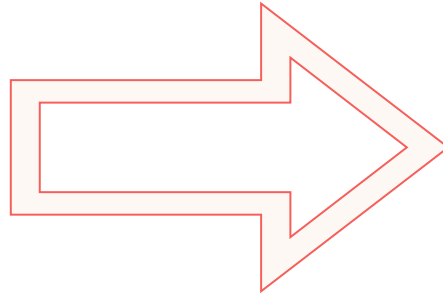
1

Circle the type of partner that feels best to you.

Religious Leader
Partner
Therapist
Spouse Doctor
Family Member
Friend

2

Write a specific name in the arrow.



3

Write something you can ask that person to do to support you.



Stuck on what to ask your partner to do?

SPOUSE/ PARTNER:

"I'd like to try a mindfulness practice together each evening."

MEDICAL PROVIDER:

"What can I do to support my mental health?"

FRIEND:

"I'm focusing on my mental health and I'm open to ideas on how to do that."

THERAPIST:

"Can we talk about how I can set boundaries for my work and family life?"

Celebrate Progress

Stay motivated! For each 15 minutes you spend taking action to improve your mental well-being, fill in one block.

Use the call-out to celebrate your Small Win of the Week!

These AARP resources

can be helpful for family caregivers who are focusing on their mental well-being:

Care for the Caregiver Guide
aarp.org/careforthecaregiver
Mental Health Resource Center
aarp.org/mentalhealth



You may have access to **EMPLOYER BENEFITS AND POLICIES** that support your mental well-being, such as health insurance, Employee Assistance Programs (EAPs), mindfulness or meditation programs, physical wellness challenges, fitness reimbursement programs, sick time/PTO, and health or flexible savings accounts that can be used for out-of-network or private pay mental health expenses. Reach out to your benefits team to learn what is available to you.

Social Well-being

Family caregivers may start to feel that their social circle has become smaller or that they spend less time socializing. Caregivers report feeling lonely or isolated. Small efforts to find the time, and the energy, to maintain social well-being, relationships, and connections can benefit other aspects of health.

The Power of Small Wins

Choosing small, incremental goals can help caregivers stay focused on progress instead of perfection and celebrate small wins to build momentum and maintain motivation.

(Check one box.)

- ☐ I'd like to find time in my week to **CONNECT WITH A FRIEND**.
- ☐ I'd like to find new ways to stay **CONNECTED WITH PEOPLE**.
- ☐ I'd welcome meeting some **NEW PEOPLE** but am not sure how to do it.
- ☐ I'd like to be in a **SOCIAL GROUP** where I can be open about the ups and downs of being a caregiver.
- ☐ I'd like to **END EACH DAY** feeling like I've really connected with someone else.
- ☐ I'd like to be more comfortable talking with my **COLLEAGUES** about my caregiving.
- ☐ [Choose your own]: _____

Take three minutes to reflect:

Which challenge is most important for me right now? I'll try to focus on that area this week and celebrate a small win along the way.

Take three minutes to reflect:

How can I set myself up to succeed in my chosen Small Win of the Week?

What is a strength I can tap into? _____

What could be an obstacle? _____

How might I work through that obstacle? _____



Choose my "Small Win of the Week"

What is something I can start to work on this week? I'll try to carve out 15 minutes most days to work towards it.

Need some inspiration to choose a **SMALL WIN OF THE WEEK**?

- Invite a friend to **RUN ERRANDS** together and/or chat on the phone while running an errand.
- **LIMIT TIME ON SOCIAL MEDIA APPS** on my phone or find time to call or video chat and talk with a friend.
- Choose a **GROUP CLASS OR AN EVENT** I can go to this week.
- Find options for **CAREGIVING SUPPORT GROUPS** (online, in-person, and/or one specific to your caregiving scenario such as dementia or cancer).
- Take time before bed to **GIVE THANKS** or reflect on today's moments of connection.
- Check out a **CAREGIVER COMMUNITY** in my workplace, such as an affinity network or resource group, or lunch meetup.

The Power of a Partner

An accountability partner can be key to achieving your Small Win of the Week. You could choose someone who is with you when you make decisions relevant to your goals. Or someone who already models the behaviors you want. Or someone who is connected in your community.

1

Circle the type of partner that feels best to you.

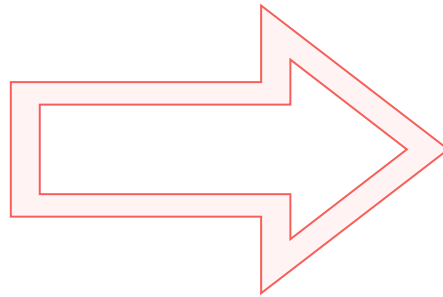
2

Write a specific name in the arrow.

3

Write something you can ask that person to do to support you.

Classmate
Therapist
Neighbor
Partner
Friend
Family Member
Spouse
Co-worker



Stuck on what to ask your partner to do?

SPOUSE/ PARTNER:

“Can we help each other take time once a week to see a friend(s)?”

THERAPIST:

“Can we talk about how my relationships are evolving while I am a caregiver?”

FRIEND:

Do you want to come to the supermarket with me so we can catch up while we shop?”

NEIGHBOR:

“Would you like to go for a 15-minute walk after dinner?”

Celebrate Progress

Stay motivated! For each 15 minutes you spend taking action to improve your mental well-being, fill in one block.



Use the call-out to celebrate your Small Win of the Week!

These AARP resources

can be helpful for family caregivers who are focusing on their social well-being. For more resources, visit aarp.org/caregiving

FACEBOOK SUPPORT GROUP:

facebook.com/groups/aarpfamilycaregivers

LOCAL EVENTS FOR CAREGIVERS: AARP.org/localcaregiving

Your employer may offer **BENEFITS** that can help improve social well-being, such as Employee Resource Groups, communities of practice, affinity groups, group chats, mentorship programs, and professional development cohorts. You can reach out to HR Benefits, Learning and Development or Employee Engagement teams to learn what's available or ask a peer or your manager for ideas.

My Financial Well-being

Family caregivers may experience financial strain. While individual situations and strategies may vary, small steps can help reduce pressure and create a feeling of accomplishment or progress.

The Power of Small Wins

Choosing small, incremental goals can help caregivers stay focused on progress instead of perfection and celebrate small wins to build momentum and maintain motivation.

(Check one box.)

- ☐ I want our **FAMILY** to have a conversation about the financial aspects of caregiving.
- ☐ I would benefit from some **EXPERT ADVICE** about my finances.
- ☐ I'd like to find ways to navigate **EXPECTATIONS** about supporting my care recipient financially.
- ☐ I'd like to understand which **COMMUNITY SUPPORTS** could reduce costs or offer savings.
- ☐ I'd like to reflect on my own **RETIREMENT** and/or future care needs.
- ☐ I'm curious about the **EMPLOYER BENEFITS** or leave that can support my own financial health.
- ☐ [Choose your own]: _____

Take three minutes to reflect:

Which challenge is most important for me right now? I'll try to focus on that area this week and celebrate a small win along the way.

Take three minutes to reflect:

How can I set myself up to succeed in my chosen Small Win of the Week?

What is a strength I can tap into? _____

What could be an obstacle? _____

How might I work through that obstacle? _____



Choose my "Small Win of the Week"

What is something I could start to work on my chosen challenge?

This week, I'll find 15 minutes most days to work towards it.

Need some inspiration to choose a **SMALL WIN OF THE WEEK?**

- Host a **FAMILY CONVERSATION** about how to create a plan to pay for care.
- Have brief conversations with **3 FINANCIAL ADVISORS** to see who can best help me make good decisions.
- Set my financial boundaries by creating a **BUDGET**.
- Call my local Area **AGENCY ON AGING** to learn about available support that can reduce our expenses.
- Schedule a consultation with an advisor from my **RETIREMENT PLAN PROVIDER**.
- Learn more about the **EMPLOYER BENEFITS** that may support my financial well-being.

The Power of a Partner

An accountability partner can be key to achieving your Small Win of the Week. You could choose someone who is with you when you make decisions relevant to your goals. Or someone who already models the behaviors you want. Or someone who is an expert in this area.

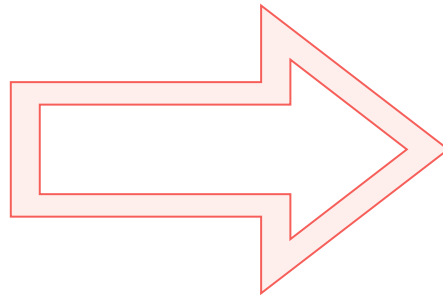
1

Circle the type of partner that feels best to you.

Eldercare Attorney
Partner
Spouse
Friend
Family
Financial Advisor

2

Write a specific name in the arrow.



3

Write something you can ask that person to do to support you.



Stuck on what to ask your partner to do?

SPOUSE/ PARTNER:

“When might we find time to create a budget together?”

FINANCIAL ADVISOR:

“Can we look at how caregiving costs impact my financial future?”

FRIEND:

“I’d like to chat about how the ‘boundaries’ conversation might go with my care recipient.”

ELDERCARE ATTORNEY:

“What are the core documents or programs we can consider to manage our financial future?”

Celebrate Progress

Stay motivated! For each 15 minutes you spend improving your financial well-being, fill in one block.



Use the call-out to celebrate your Small Win of the Week!

These AARP resources

can be helpful for family caregivers who are focusing on their physical well-being.

QR

AARP FINANCIAL
WORKBOOK FOR
FAMILY CAREGIVERS
[Link here](#)

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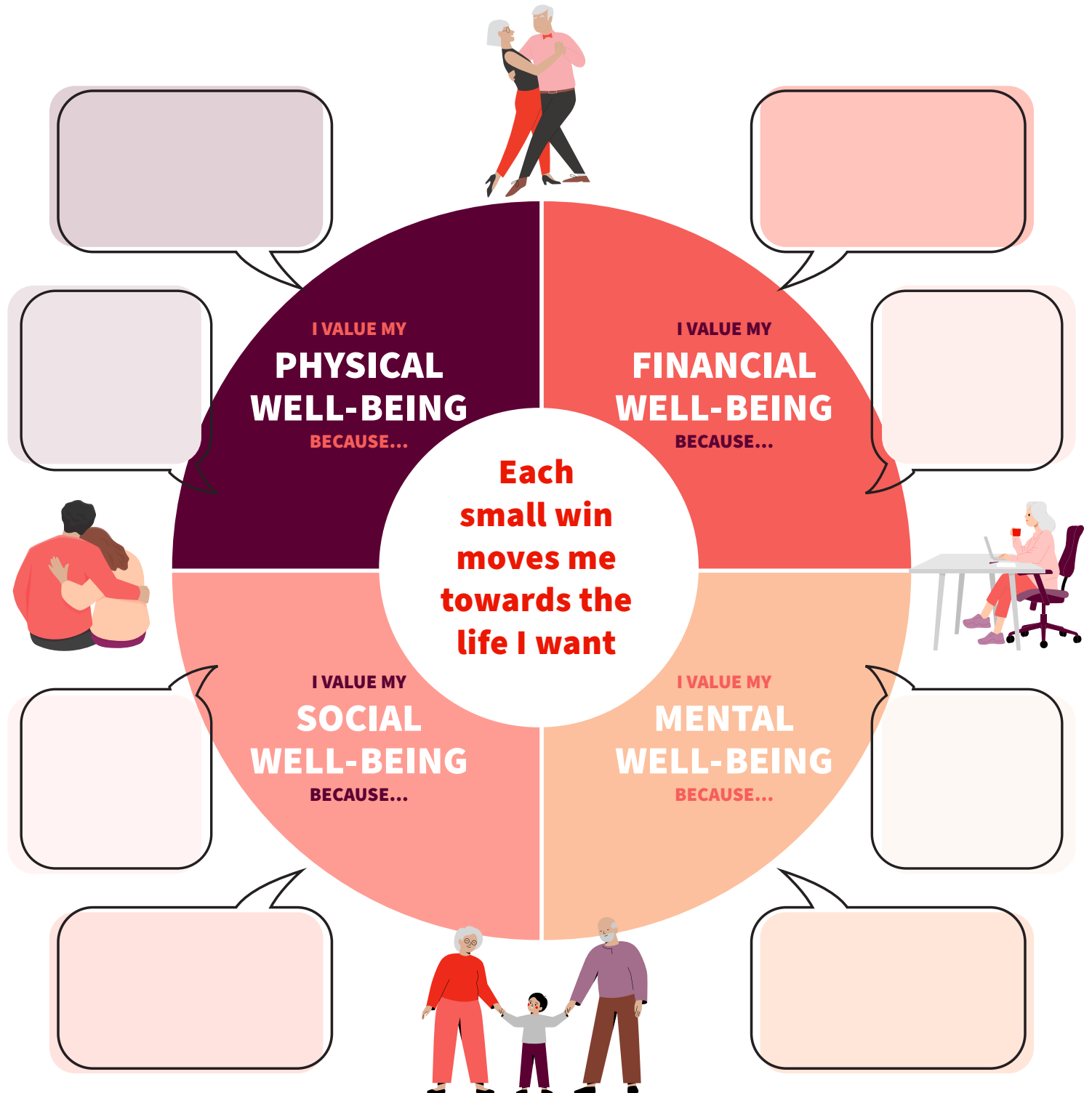
AARP INTERVIEW AN
ADVISOR TOOL
[Link here](#)

Many **EMPLOYER BENEFITS AND POLICIES**

can help improve financial well-being, such as retirement savings plans and employer contributions, student loan support, care discounts, and tax-advantaged health accounts. You can reach out to HR to learn what is available.

Celebrate Progress

Spending time on self-care each day might really make a difference, especially when small wins move you toward the values and vision of a future state that motivates you.



³ <https://hbr.org/2011/05/small-wins-and-feeling-good>



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