

Workable Family Agreements - Checklist

Family meetings

A family meeting, facilitated by a trained mediator is an opportunity for family members to get together to discuss arrangements for an older family member. Having a family meeting enables the family to discuss issues of concern openly, which means that any conflict can be managed constructively and family relationships can be preserved or enhanced. A facilitated meeting helps families to have difficult conversations, and make decisions and plans for the future.

Dispute Settlement Centre of Victoria:

Ph: 9603 8379 or 1800 658 528 (country callers only)

Website: www.disputes.vic.gov.au/

Hope for the best/Plan for the worst :

Questions to think about before the meeting

This checklist will help you organise your thoughts for your discussion, what you will need to discuss and where to find out more information. This is not an exhaustive list, but should be enough to get you started.

Financial Considerations

- If the older person has provided funds for the accommodation/granny flat – is this a loan or gift? The lender and receiver should get independent financial advice.
- What will be the impact of any sale of assets upon Wills and Estate planning ?
- If it doesn't work out will the older person be able to get their money back?
- Will Centrelink payments be affected by the new arrangement?
- How are arrangements with Centrelink affected if the older person moves out?
- Will the carer have to reduce their income or hours of work, or scale back their business?
- What are the impacts on the carer's income? Has this been calculated into the arrangement?
- Is the older person expected to assist in kind, e.g. child minding or home duties?
- What will happen if the carer's finances change, e.g. lose employment, business debts?

Living arrangements

- Who will pay for food, housekeeping, utility bills, petrol, transport?
- Who does the cleaning/gardening and how will it be done (what, frequency, thoroughness)?
- What changes are needed to assist the mobility of the older person and who pays for these?
- What home help is already needed and will this be part of the new living arrangements?
- Who prepares the meals and cleans up afterwards? Will this be shared?
- What food is prepared – preferred diet or special diet needs – and when are meals?
- What will be shared spaces – kitchen, living, bathroom, toilets?
- How are they shared – together or at different times, how are these negotiated?
- What role will the older person have in terms of minding/parenting grandchildren?
- How will you manage holidays? Who will care for the older person if they can't or don't want to join in family vacations?
- If there are pets, what are the arrangements for them – is everyone happy to live with them?
- What are the shared expectations for home security?
- What are the expectations in relation to driving and transport in general?

Visitors

- Are visitors able to come whenever the older person wishes – do they have space to meet them apart from other residents?
- What happens when visitors come for the other residents– is the older person included or do they have a separate living space or will they retire to their bedroom?
- What happens if visitors are noisy or there is loud music?
- What degree of quiet and noise is the usual lifestyle of the older person and other residents?
- Smoking and drinking – is this tolerated – where and how much?
- Does the older person have somewhere else to go if they want a break?

Health

- What will happen if one person's health deteriorates so that significantly more care is needed or home care is no longer an option?
- Will the older person be able to afford to move into residential care?
- Does the older person have a preferred health care provider?
- Have any arrangements been made for enduring power of attorney, guardianship and end of life decisions?
- What outside care arrangements does the older person need, and are there any plans for respite care?

Relationships

- How will this arrangement affect all members of the household, including children and partners?
- Have you considered the impact of new marriages and step-family situations?
- How did you get on in the past? Will you have conflicts in relation to religious, political or other matters?
- How will you resolve conflicts? Is there a family member or trusted professional who can assist, or would it be better to get an independent body to assist?

Other information

You may need to obtain information about your financial or legal position or about the older person's health needs before coming to the family meeting. You may consider speaking to any or all of the following:

- Lawyer
- Financial planner
- Centrelink
- GP or other health practitioner