

# Family Dynamics Observation Checklist

## LOOKING BEYOND THE CARE PLAN

A practical guide for professionals working with older adults and their families.



### WHAT WE SEE

- Care needs
- Medical issues
- Home safety
- Housing options
- Medication management
- Finances

### WHAT WE DON'T SEE

- Family roles
- Guilt and obligation
- Communication patterns
- Long-standing conflict
- Fear of change
- Unresolved dynamics
- Different expectations



BEFORE ASSUMING A FAMILY IS RESISTANT, DIFFICULT, OR DISENGAGED, CONSIDER WHAT MAY BE HAPPENING BENEATH THE SURFACE.

This tool is not intended to diagnose family dysfunction. It is designed to help professionals identify relational factors that may be influencing communication, decision-making, and care planning.

## 1 OBSERVATION CHECKLIST

### COMMUNICATION PATTERNS

Check any observations that apply.

- One person dominates most conversations
- The older adult rarely speaks
- Family members interrupt one another
- Different family members tell conflicting stories
- Discussions become emotionally charged quickly
- Family members avoid certain topics
- Conversations repeatedly circle without resolution
- There appears to be tension that is not openly discussed

### DECISION-MAKING PATTERNS

Check any observations that apply.

- Decisions are delayed despite clear need
- Solutions are identified but not implemented
- Family members appear afraid of upsetting someone
- One individual seems to hold disproportionate influence
- Guilt appears to be driving decisions
- Family members appear stuck despite having information
- The family is waiting for a crisis before acting

## 2 CAREGIVING ROLES

Check any observations that apply.

- One person attends every appointment
- One person is coordinating everything
- One person appears overwhelmed or exhausted
- Responsibilities appear unevenly distributed
- Family members express resentment
- Family members disagree about responsibilities
- Someone appears to be carrying responsibilities they never expected to carry

### REFLECTION

Who appears to be carrying the majority of the burden?



What support might they need?

## 3 COMMON PATTERNS WE SEE



### 1 THE BURNED-OUT DAUGHTER

What you may observe

- Frustration
- Ultimatums
- Emotional exhaustion
- Statements such as:
  - "I've tried everything."
  - "Nobody helps."
  - "I can't do this anymore."

#### CONSIDER

What appears to be anger may actually be exhaustion.



### 2 THE PARENT WHO REFUSES HELP

What you may observe

- Resistance to retirement living
- Refusal of home care
- Repeated objections

#### CONSIDER

The barrier may be fear, identity, grief, loss of control, or a lifetime of independence.



### 3 THE CRISIS FAMILY

What you may observe

- No planning until an emergency
- High emotional intensity
- Repeated crises

#### CONSIDER

Avoidance may have become the family's primary coping strategy.



### 4 THE FAMILY THAT LOOKS FINE

What you may observe

- Polite conversations
- Cooperation during meetings
- No obvious conflict

#### CONSIDER

Some families are highly skilled at maintaining appearances.

The conflict may not appear until decisions need to be implemented.

Pay attention to follow-through, not just agreement.



### 5 ALCOHOL, DEMENTIA, AND DENIAL

What you may observe

- Family disagreement
- Conflicting accounts
- Minimization of concerns

#### CONSIDER

Multiple issues may be interacting at the same time. Move toward observable facts rather than labels.

## 4 PROFESSIONAL REFLECTION



What problem is the family presenting?



What problem may exist underneath the presenting problem?



What family pattern appears most relevant?



What assumptions might I be making?



What additional conversations may be needed?



The older adult is only one part of the picture.

When we focus solely on health, safety, housing, and finances, we risk missing the family dynamics that often determine whether a care plan succeeds. Family dynamics do not disappear when someone ages. In many cases, they become more visible.

