

1 The committee held numerous meetings during the fall of
2 2006 and submitted a special committee report to the legislature
3 outlining its proposal for the establishment of a comprehensive
4 and sustainable, community-based family caregiver support system
5 that will maximize resources in all communities. However, it is
6 still necessary to gather more information on this subject to
7 enable the State to apply resources and services in a more
8 efficacious manner. The committee should be extended to enable
9 it to continue work on its proposal for the establishment of a
10 comprehensive and sustainable, community-based family caregiver
11 support system.

12 Numerous testifiers appeared before the committee on behalf
13 of grandparents in support of recognizing their role as family
14 caregivers for their grandchildren. According to the United
15 States Census Bureau, between 1990 and 2000, there was an over
16 thirty per cent increase in the number of children under age
17 eighteen living in grandparent-headed households in Hawaii. Of
18 the 14,029 grandparents in Hawaii who report that they are
19 responsible for their resident grandchildren, over one-fifth
20 also report that the children's parents are not present in the
21 household.



1 The national family caregiver support program under the
2 reauthorized Older Americans Act includes grandparents of
3 grandchildren age eighteen years and younger or nineteen years
4 of age or older with physical or cognitive limitations.
5 Grandparents who are caregivers experience similar support needs
6 and caregiving costs as do family caregivers who provide unpaid,
7 informal assistance to older adults with physical or cognitive
8 disabilities. Custodial grandparenting has emotional, physical,
9 and financial costs. Custodial grandparents report more
10 anxiety, depression, and physical health problems than their
11 non-caregiving peers, and they need accurate and accessible
12 information on a myriad of issues.

13 A crucial element in the design and implementation of a
14 comprehensive and sustainable, community-based family caregiver
15 support system is an assessment of the needs of family
16 caregivers and the care recipients. A thorough needs assessment
17 is imperative to appropriately encourage, support, and
18 strengthen the provision of family caregiving.

19 Family caregivers who provide care to recipients with
20 chronic or disabling conditions are themselves at risk for
21 physical, emotional, and financial problems. The daily
22 challenges and health risks that family caregivers face can



1 impede the family caregiver's ability to provide care, lead to
2 higher health care costs, and affect the family caregiver's
3 quality of life and the quality of life of the care recipient.

4 For many family caregivers, their role as family caregiver
5 arises as suddenly as the care recipient's health declines,
6 leaving family caregivers with an immediate need for services,
7 but little preparation or education regarding who to contact for
8 assistance or what services are available to them. In addition,
9 the family caregivers may not know who is capable or qualified
10 to provide them with the services that they or the care
11 recipients need. Family caregivers themselves need support
12 services, including respite services and training, education,
13 and counseling in areas such as caregiving and dealing with
14 end-of-life issues.

15 Kupuna care is a statewide long-term care program,
16 administered by the executive office on aging, which was
17 developed in partnership with the county area agencies on aging
18 to address the growing numbers of elders with long-term care
19 needs. Services provided by kupuna care are intended to help
20 meet the needs of older adults who cannot live at home without
21 adequate help from family or formal caregiving services, and
22 include services such as adult day care, respite care, assisted



1 transportation, attendant care, case management, chore, home
2 delivered meals, homemaker, transportation, and personal care.
3 In addition to the services provided to the elderly, direct
4 services to family caregivers can be provided to educate and
5 assist family caregivers in coping with their roles as a
6 caregiver.

7 Under Act 262, Session Laws of Hawaii 2006, the executive
8 office on aging is required to coordinate a statewide system of
9 caregiver support services. An appropriation should be made to
10 assist the executive office on aging's caregiver's resource
11 initiative project to enable it to continue its efforts in that
12 regard.

13 A number of approaches have been suggested as a means to
14 help family caregivers with the financial costs of family
15 caregiving, including a cash and counseling program and a family
16 caregiver refundable tax credit. However, more research and
17 analyses of these different approaches are necessary to ensure
18 that the State applies its resources and services toward helping
19 family caregivers in the most efficacious manner.

20 The purpose of this Act is to strengthen support of family
21 caregiving by:



- 1 (1) Extending the life of the joint legislative committee
2 on family caregiving;
- 3 (2) Authorizing the joint legislative committee to explore
4 establishing a paid family leave program under the
5 state temporary disability insurance law;
- 6 (3) Providing a broader definition of "family caregiver"
7 by including grandparents who are caregivers for
8 grandchildren who are age eighteen years or younger or
9 nineteen years of age or older with physical or
10 cognitive limitations;
- 11 (4) Requiring the executive office on aging to conduct a
12 comprehensive assessment of the needs of care
13 recipients who are age sixty and older with physical
14 or cognitive disabilities, and the needs of their
15 family caregivers;
- 16 (5) Appropriating funds for the executive office on aging
17 to conduct a comprehensive assessment of the issues
18 facing, and the needs of, grandparents raising
19 grandchildren who are age eighteen years or younger or
20 who are eighteen years of age or older with physical
21 or cognitive limitations;



- 1 (6) Appropriating funds to expand the kupuna care
2 program's in-home and access services for qualified
3 care recipients;
- 4 (7) Appropriating funds to provide direct services to
5 family caregivers;
- 6 (8) Appropriating funds for the operation and delivery of
7 the Sage PLUS program on the neighbor islands, and for
8 the recruitment, training, and retention of volunteers
9 to augment the program staff;
- 10 (9) Appropriating funds to the executive office on aging
11 for the caregiver's resource initiative project,
12 including the continuation of its efforts to
13 coordinate a statewide system of family caregiver
14 policies and support services; and
- 15 (10) Appropriating funds to the executive office on aging
16 to provide analyses of two different approaches to
17 helping family caregivers with their financial needs.

18 **PART II**

19 **JOINT LEGISLATIVE COMMITTEE ON FAMILY CAREGIVING**

20 SECTION 2. Act 285, Session Laws of Hawaii 2006, is
21 amended by amending section 2 to read as follows:



1 "SECTION 2. (a) There is established a joint legislative
2 committee on family caregiving. The committee shall be composed
3 of eight members as follows:

4 (1) Four members of the house of representatives,
5 consisting of three members from the majority party
6 and one member from the minority party, who shall be
7 appointed by the speaker of the house of
8 representatives; and

9 (2) Four members of the senate, consisting of three
10 members from the majority party and one member from
11 the minority party, who shall be appointed by the
12 president of the senate.

13 The committee shall select a chairperson from its
14 membership.

15 (b) The joint legislative committee shall develop
16 comprehensive public policy to strengthen support for family
17 caregivers [~~who provide unpaid, informal assistance to persons~~
18 ~~age sixty and older with physical or cognitive disabilities~~].

19 For purposes of this Act, "family caregiver" means:

20 (1) A person, including a non-relative such as a friend or
21 neighbor, who provides unpaid, informal assistance to



1 a person age sixty and older with physical or
2 cognitive disabilities; and

3 (2) A grandparent who is a caregiver for a grandchild who
4 is age eighteen years or younger, or who is nineteen
5 years of age or older with physical or cognitive
6 limitations.

7 (c) The joint legislative committee shall ~~[consider]~~:

8 (1) Consider providing support in categories including
9 ~~[but not limited to]:~~

10 ~~[(1)]~~ (A) Coordinated services and policies;

11 ~~[(2)]~~ (B) Training and education;

12 ~~[(3)]~~ (C) Respite services;

13 ~~[(4)]~~ (D) Financial incentives; and

14 ~~[(5)]~~ (E) Balancing work and caregiving[-]; and

15 (2) Explore establishing a paid family leave program under
16 the state temporary disability insurance law, similar
17 to the California Paid Family Leave Program, to
18 provide wage replacement benefits to employees who
19 take time off from work to care for a seriously ill
20 family member.

21 (d) The joint legislative committee shall seek input from
22 the department of health, the department of human services, the



1 department of taxation, the University of Hawaii, the executive
2 office on aging, and the elderly, disability, business, and
3 faith-based communities.

4 (e) The joint legislative committee shall submit its
5 findings and recommendations to the legislature no later than
6 twenty days prior to the convening of the regular [session]
7 sessions of 2007[-] and 2008.

8 (f) The joint legislative committee shall cease to exist
9 on [~~June 30, 2007.~~] June 30, 2008."

10 **PART III**

11 **NEEDS ASSESSMENT OF FAMILY CAREGIVERS**

12 SECTION 3. (a) The executive office on aging shall
13 conduct a comprehensive assessment of the needs of care
14 recipients who are age sixty and older with physical or
15 cognitive disabilities and the needs of their family caregivers.

16 The needs assessment should include an evaluation of:

- 17 (1) The extent of the unmet caregiving needs of persons
18 age sixty and older with physical or cognitive
19 disabilities;
- 20 (2) The size of the current family caregiver population;
- 21 (3) The percentage of care recipients' needs being met by
22 paid versus unpaid caregivers; and



1 (4) The impact of caregiving on family caregivers'
2 employment and income.

3 (b) In conducting the needs assessment, the executive
4 office on aging shall identify and review past surveys, such as
5 the *2003 Hawaii Health Survey*, include focus groups, and develop
6 policy questions to guide the focus of the needs assessment.

7 (c) In conducting the needs assessment, the executive
8 office on aging may utilize telephone surveys or other methods
9 of gathering reliable data regarding care recipients' needs and
10 the needs of their family caregivers, including purchasing
11 additional questions for the upcoming *Hawaii Health Survey*.

12 (d) The executive office on aging shall submit the
13 completed needs assessment to the joint legislative committee on
14 family caregiving no later than twenty days prior to the
15 convening of the regular session of 2008 to facilitate the
16 development of a comprehensive, sustainable, and community-based
17 family caregiver support system.

18 (e) For purposes of this section, "family caregiver" means
19 a person, including a non-relative such as a friend or neighbor,
20 who provides unpaid, informal assistance to a person age sixty
21 and older with physical or cognitive disabilities.



1 SECTION 4. The executive office on aging shall submit a
2 report, including the completed needs assessment pursuant to
3 section 3 and any proposed legislation, to the legislature no
4 later than twenty days prior to the convening of the regular
5 session of 2008.

6 SECTION 5. There is appropriated out of the general
7 revenues of the State of Hawaii the following sums or so much
8 thereof as may be necessary for fiscal year 2007-2008 for the
9 executive office on aging to conduct a comprehensive needs
10 assessment pursuant to section 3.

11 Senate \$
12 House of representatives \$

13 The sum appropriated shall be expended by the senate and
14 the house of representatives to assist the executive office on
15 aging for the purposes of this part.

16 PART IV

17 NEEDS ASSESSMENT OF GRANDPARENTS RAISING GRANDCHILDREN

18 SECTION 6. There is appropriated out of the general
19 revenues of the State of Hawaii the sum of \$ or so
20 much thereof as may be necessary for fiscal year 2007-2008 for
21 the executive office on aging to conduct an assessment of the



1 issues facing, and the needs of, grandparents raising
2 grandchildren in Hawaii.

3 Senate §

4 House of representatives §

5 The sum appropriated shall be expended by the senate and
6 the house of representatives to assist the executive office on
7 aging for the purposes of this part.

8 SECTION 7. The executive office on aging shall submit a
9 report, including the completed needs assessment pursuant to
10 section 6 and any proposed legislation, to the legislature no
11 later than twenty days prior to the convening of the regular
12 session of 2008.

13 PART V

14 SERVICES

15 SECTION 8. There is appropriated out of the general
16 revenues of the State of Hawaii the sum of \$ or so
17 much thereof as may be necessary for fiscal year 2007-2008 and
18 the same sum or so much thereof as may be necessary for fiscal
19 year 2008-2009 to the executive office on aging to expand the
20 kupuna care program's in-home and access services to qualified
21 care recipients.



1 The sums appropriated shall be expended by the department
2 of health for the purposes of this part.

3 SECTION 9. There is appropriated out of the general
4 revenues of the State of Hawaii the sum of \$ or so
5 much thereof as may be necessary for fiscal year 2007-2008 and
6 the same sum or so much thereof as may be necessary for fiscal
7 year 2008-2009 to the executive office on aging to provide
8 direct services to family caregivers.

9 The sums appropriated shall be expended by the department
10 of health for the purposes of this Act.

11 SECTION 10. There is appropriated out of the general
12 revenues of the State of Hawaii the sum of \$ or so
13 much thereof as may be necessary for fiscal year 2007-2008 and
14 the same sum or so much thereof as may be necessary for fiscal
15 year 2008-2009 to the executive office on aging for the
16 caregiver's resource initiative project, including the
17 continuation of its efforts to coordinate a statewide system of
18 family caregiver policies and support services.

19 The sums appropriated shall be expended by the department
20 of health for the purposes of this part.

21 SECTION 11. There is appropriated out of the general
22 revenues of the State of Hawaii the sum of \$ or so



1 much thereof as may be necessary for fiscal year 2007-2008 and
2 the same sum or so much thereof as may be necessary for fiscal
3 year 2008-2009 for operation and delivery of the Sage PLUS
4 program on the neighbor islands.

5 The sums appropriated shall be expended by the department
6 of health for the purposes of this section.

7 SECTION 12. There is appropriated out of the general
8 revenues of the State of Hawaii the sum of \$ or so
9 much thereof as may be necessary for fiscal year 2007-2008 and
10 the same sum or so much thereof as may be necessary for fiscal
11 year 2008-2009 for the recruitment, training, and sustaining of
12 volunteers to augment the Sage PLUS program staff, and for
13 operating costs of the neighbor island Sage PLUS program staff.

14 The sums appropriated shall be expended by the department
15 of health for the purposes of this section.

16 PART VI

17 APPROACHES TO FINANCIAL NEEDS OF FAMILY CAREGIVERS

18 SECTION 13. (a) The cash and counseling program is a
19 national initiative sponsored by the Robert Wood Johnson
20 Foundation; the United States Department of Health and Human
21 Services, Office of the Assistant Secretary for Planning and
22 Evaluation; and the Administration on Aging. Under the program,



1 recipients of medicaid personal care services or home- and
2 community-based services receive a flexible monthly allowance
3 and decide who to hire and what services they want to receive.

4 The program's innovative approach enables participants to
5 direct and manage their personal assistance services according
6 to their own specific needs. Participants can choose a family
7 member or friend, in lieu of an agency worker, to provide the
8 services. They receive counseling and fiscal assistance to help
9 them manage their allowance and responsibilities. The program
10 was first implemented in Arkansas, New Jersey, and Florida, and
11 has since expanded to include twelve other states.

12 The potential exists to establish a similar program here in
13 Hawaii to serve the needs of residents receiving medicaid
14 personal care services or home- and community-based services, as
15 well as residents who are not medicaid recipients.

16 (b) A tax credit to caregivers who care for qualified care
17 recipients is another approach to helping family caregivers
18 defray some of the cost of providing invaluable caregiving
19 services. One measure introduced during the 2007 legislative
20 session, Senate Bill No. 1199, S.D. 2 (2007), provides eligible
21 taxpayers with a refundable income tax credit on a sliding scale
22 basis.



- 1 SECTION 14. (a) The executive office on aging shall:
- 2 (1) Research the cash and counseling program and its
- 3 implementation in other states, including Arkansas,
- 4 New Jersey, and Florida;
- 5 (2) In completing its research:
- 6 (A) Contact the national program office at the Boston
- 7 college graduate school of social work, which
- 8 coordinates replications of the program;
- 9 (B) Consult with the Robert Wood Johnson Foundation,
- 10 the Office of the Assistant Secretary for
- 11 Planning and Evaluation at the United States
- 12 Department of Health and Human Services, the
- 13 Administration on Aging, the department of human
- 14 services, and the department of health; and
- 15 (C) Examine models that include individuals receiving
- 16 medicaid personal care services or home- and
- 17 community-based services, as well as individuals
- 18 who are not medicaid recipients;
- 19 (3) Submit an interim report of its research findings to
- 20 the legislature no later than twenty days prior to the
- 21 convening of the 2008 regular session;
- 22 (4) Use the report of its research findings to:



- 1 (A) Develop a plan for how to implement a similar
- 2 program here in Hawaii to serve the needs of
- 3 residents who are not medicaid recipients; and
- 4 (B) Prepare a cost-benefit analysis of implementing a
- 5 similar program here in Hawaii to serve the needs
- 6 of residents who are not medicaid recipients; and
- 7 (5) Submit a final report, including the plan and cost
- 8 benefit analysis, to the legislature no later than
- 9 twenty days prior to the convening of the 2009 regular
- 10 session.
- 11 (b) The executive office on aging shall also:
- 12 (1) Prepare a cost-benefit analysis of a \$1,000, \$750, and
- 13 \$500 family caregiver refundable tax credit as
- 14 proposed in Senate Bill No. 1199, S.D. 2 (2007); and
- 15 (2) Submit a report, including the results of the
- 16 cost-benefit analysis, to the legislature no later
- 17 than twenty days prior to the convening of the 2008
- 18 regular session.

19 SECTION 15. There is appropriated out of the general
 20 revenues of the State of Hawaii the sum of \$ or so
 21 much thereof as may be necessary for fiscal year 2007-2008 and
 22 the same sum or so much thereof as may be necessary for fiscal



1 year 2008-2009 to the executive office on aging for the purposes
2 of section 14 of this Act.

3 The sums appropriated shall be expended by the department
4 of health for the purposes of this part.

5 **PART VII**

6 **MISCELLANEOUS PROVISIONS**

7 SECTION 16. Statutory material to be repealed is bracketed
8 and stricken. New statutory material is underscored.

9 SECTION 17. This Act shall take effect upon its approval;
10 provided that sections 5, 6, 8, 9, 10, 11, 12, and 15 shall take
11 effect on July 1, 2007; and further provided that section 2
12 shall take effect on June 29, 2007.



Report Title:

Family Caregivers; Omnibus Package

Description:

Strengthens support of family caregivers by, among other things: extending the joint legislative committee on family caregiving, requiring the executive office on aging to conduct a comprehensive assessment of care recipients' needs and the needs of their family caregivers, and appropriating funds to expand services for care recipients and their family caregivers. Expands SAGE Plus program to the neighbor islands. (SD2)

