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When Siblings Step Up

BY ANNE TERGESEN

When Rene Talavera's father, Jesus Talavera, 69, was hospitalized for kidney and heart failure last fall, the 45-year-old Chicago resident and his four siblings were catapulted into an uncomfortable new phase of life: caregiving.

At first, Rene Talavera says, the family descended into "disarray and dysfunction." The hospital staff didn't know who was in charge. And soon after Jesus Talavera was discharged, the only family member available to stay with him was Kristopher, a 20-year-old grandson. "It was very haphazard," Rene Talavera recalls.

But even as the Talavera siblings absorbed the shock of their father's illness, they set aside old conflicts and concerns to work together. "The common thread is that you all love your parent," says Rene Talavera. "It's not about you or an argument you had 20 years ago. It's about Dad and what you can do for him."

Family cohesiveness is a tall order at any time of life. But as parents grow frail, brothers and sisters often encounter new obstacles to togetherness—at precisely the time they most need to rely on one another. Sibling rivalry can emerge or intensify as

adult children vie, one last time, for a parent's love or financial support. And even as parents grow dependent on children, the desire to cling to old, familiar roles can create a dysfunctional mess

Today, with the economy and household finances in disrepair, such

strains are more pronounced. According to a recent report by the National Alliance for Caregiving and AARP, about 43.5 million Americans look after someone 50 or older, 28% more than in 2004. In comparison with 2004, a smaller percentage—41% versus 46%—are hiring help. And more—70% versus 59%—are reaching out to unpaid help, such as family and friends.

Experts say it's crucial that families figure out ways to work together, to work through their

differences, for the common goal of caring for a parent. If they don't, their parents will suffer—and so will they.

"Family caregivers are the backbone of the long-term-care system in this country," says Francine Russo, author of a new book about how siblings can cope with aging parents, "They're Your Parents, Too!" Siblings who work together, she adds, can help preserve not just one another's health and sanity but also a "last link to their first family."

With that in mind, here's a look at the challeng-



es brothers and sisters might face when caring for aging parents, along with advice on how to navigate this transition.

Starting Fresh

Experts say that as difficult as it can be to leave entrenched roles behind, siblings should try to wipe the slate clean.

“Often, family members say they can’t count on someone because of something that happened years ago,” says Steven Barlam, co-founder of **LivHOME Inc.**, a Los Angeles-based employer of home health aides and geriatric-care managers, who help families find services, vet living options, hire home health aides and figure out a long-term-care plan. “Our philosophy is generally to encourage them to give the person a second chance,” he says.

As in many families, the Talaveras are used to playing certain roles. Rene, a hairdresser turned real-estate agent, is a free spirit: “I always danced to my own beat,” he says. Rebecca, 39, who was a high-achieving student, is now dean of students at a suburban Chicago high school. Valerie, 40, had a rockier time: When her father fell ill, she was working to put substance-abuse problems behind her.

But when caring for their father, the Talaveras moved beyond the labels that defined them in the past. Along with a fourth Chicago-based sibling, Richard, they divided up the work. Rebecca assumed responsibility for her father’s finances, Richard runs errands, Rene handles medical appointments. Valerie is the live-in caretaker. “He brought me into this world. Now it’s my turn to take care of him,” she says.

“I can look at the past and say she screwed up,” Rene says of his sister. “But this is now, and I am not going to hold that against her. I am very proud of her.”

Mr. Barlam recommends that families take steps to hold everyone accountable. After dividing tasks, for example, a family might schedule a conference call within 24 hours to see what has been accomplished. Rene Tavalera says what works for his family is “a system of checks and balances.” While Valerie runs her father’s household, Rebecca holds the purse strings.

Asking for Support

Still, in many ways the Talavera family is unusual. The vast majority of families fall back on one primary caregiver—often, a daughter or the child who lives closest to Mom and Dad. Among caregivers nationwide, fewer than 10% say there is an equal division of labor, according to the National Alliance for Caregiving and AARP, the Washington-based advocacy group.

For those taking the lead, the stress can be significant. According to the recent NAC/AARP survey, 17% said the responsibility had taken a toll on their health, and 31% described the situation as emotionally stressful. Among those with jobs, two-thirds said they had gone to work late, left early or taken time off. And 15% said they had made significant financial sacrifices.

One obvious solution, to ask for help, is something many find difficult, says Barbara McVicker, author of “Stuck in the Middle,” which offers tips for caregivers.

Like many with aging parents, Kelly Jackson, 58, thought she could juggle the competing de-



Eli Meir Kaplan for The Wall Street Journal

The Jacksons

Dorothy Jackson (center) and her daughters Kelly (left) and Sally.

mands of caregiving with a high-powered job—in her case, as executive assistant to Republican political adviser Mark McKinnon. But as her mother’s health deteriorated, the pressure got to be too much.

One day in 2007, Ms. Jackson pulled into her mother’s Austin, Texas, driveway with a car full of groceries. While talking with her boss on a cellphone, she took a good look at the lawn: “It looked like a West Texas prairie dog town,” she says. Suddenly feeling overwhelmed, Ms. Jackson

burst into tears, hung up on her boss and dialed her sister in Los Angeles.

“She said ‘I don’t know what to do anymore,’ “ recalls Sally Jackson, 59, who eventually moved to Austin to help Kelly and their mother. “I had never heard Kelly say anything like that before.”

Experts recommend asking for help as soon as possible. Often, they say, it’s a good idea to call a family meeting, in person or over the phone, to discuss how the responsibilities can be shared.

“When you are a caregiver, you have to think of yourself as the [chief executive] of a very small nursing home,” says Ms. McVicker. “CEOs ask for help and delegate all the time.”

Rona Bartelstone, a senior vice president at **SeniorBridge**, a New York-based company that provides care-management services, often coaches clients on how to ask for help—without drama. While you might feel like accusing your brother of neglect, for example, Ms. Bartelstone instead suggests something less incendiary, such as explaining that “Mom needs a call every day” and asking, “Which days are best for you?”

If family members are at odds, consider hiring a geriatric-care manager (caremanager.org), a mediator who specializes in the elderly (mediate.com) or a family therapist.

Help From a Distance

Technological advances have made it easier for far-flung siblings to get involved. Web sites, such as GenerationsUnite.com and caregiverhelper.com make it possible for the entire family to access a parent’s calendar or documents such as medical records.

Moreover, you don’t have to live nearby to pay bills, talk with doctors and insurers, or locate transportation and paid help.

About a year after Trish Goodwin was diagnosed with cancer in July 2007, the mother of two gave up her condominium in Westfield, Ind., and moved in with her older daughter, Amie Peele Carter, 39,

in nearby Zionsville, Ind. With two young children and a job as a partner in the Indianapolis office of a law firm, Amie managed to care for Ms. Goodwin until her death, at age 62, last August. “We never did hire a nurse,” Amie said.

But Amie received plenty of help—from a distance—from her sister, Melanie Martin-Peele, 36. A medical researcher at the University of Connecticut Health Center, Melanie spent hours researching her mother’s illness and treatment options.

The Windsor, Conn., resident also helped her sister set up a Web site through carecentral.com, a service that helps families communicate and find caregiving help. The sisters used their site to ask for help with meals and transportation for Ms. Goodwin.

Ms. Martin-Peele also scheduled periodic visits to give her sister a break.

In the two years between Ms. Goodwin’s diagnosis and her death, Melanie traveled to Indianapolis about a dozen times.

“She would provide me with a respite,” says Amie, who frequently called her sister for moral support.

“She and I weren’t always this close,” Amie adds. “But when Mom got sick, we would talk all the time.”

When playing a supporting role, experts caution not to criticize or second-guess. “Understand that in a short visit you may not see the same behavior your sibling does,” says Ms. Russo, who adds: “Caregivers need to feel appreciated.”

What if your sibling rebuffs your offers to help? Keep asking, says Deborah Newquist, director of geriatric services for **ResCare Inc.**, a Louisville, Ky., company that provides care management, among other services. You might also ask a third party—such as a friend or clergy member—to lobby on your behalf.

Building Consensus

Siblings often have different ideas about everything from whether an aging parent should live in-



THE TALAVERAS

(clockwise from left) Kristopher, Valerie, Jesus, Rebecca and Rene Talavera

Beth Rooney for The Wall Street Journal

dependently to how often they should visit. While daughters often feel it's their duty to make a parent happy, sons tend to focus on providing care, says Ms. Russo.

To further complicate matters, brothers and sisters often come to grips with a parent's decline at different times. Some may be in denial. But parents can also "put on a good show" for children they don't see often, says Ms. Russo.

Ms. Russo says siblings need to be flexible. "Don't insist there is one right way to do or see things."

Sylvia Thompson, 42, says she and her five siblings didn't always see eye-to-eye about their mother's situation as she got older. Jeannine Thompson was a diabetic whose behavior became increasingly erratic later in life, the daughter says. Ms. Thompson, who thought her mother belonged in an institution, works in the field of caregiving and says she "saw red flags the others didn't see."

But Jeannine Thompson was fiercely independent. And some of Ms. Thompson's siblings felt their mother was competent to make her own decisions. Though disappointed, Ms. Thompson says her colleagues at LivHOME—where she advises families of seniors and the disabled—helped her learn to "deal with the different rates at which people accept things."

Opinion Shift

Gradually, the family came around to Ms. Thompson's view. One reason: In 2002, the police in their hometown of Canton, Ohio, found Jeannine Thompson in a park, on the verge of a diabetic coma, Ms. Thompson recalls.

Concerned for her mother's safety, Ms. Thompson, who lives in Santa Monica, Calif., filed a report with an Ohio office of Adult Protective Services. Soon after, all six siblings filed for legal guardianship—a court proceeding they won, much to their mother's dismay.

Ms. Thompson says she has no regrets about waiting for her siblings' support before making such a move. "I love my siblings," she says. "They were my moral compass growing up. I didn't want to alienate them." Moreover, Ms. Thompson says, by sticking together, she and her siblings were able to provide better care for their mother, who died in 2007 at age 74.

"We decided everything would be done by consensus," says Ms. Thompson, whose brothers and sisters divided the work and kept one another informed through weekly conference calls.

If you have legal power over a parent's finances, experts say, it's crucial to share information with your siblings—for example, by sending them quarterly updates of what you've spent. They also suggest including your siblings in as many important decisions as is practical. "Doing otherwise can breed suspicion," says Harry Margolis, an elder-law attorney at Margolis & Bloom LLP in Boston.

Particularly when caregivers make financial sacrifices, elder-law attorneys say it can be appropriate to compensate them. Howard Krooks, a lawyer who practices in Boca Raton, Fla., and Rye Brook, N.Y., says nearly all of his clients who serve as caregivers are compensated. Such cases currently comprise about 20% of his workload—a figure that has doubled since before the recession.

Write It Down

The family should document the caregiver's responsibilities, hours and pay, in a formal contract and disclose the arrangements to everyone in the family, Mr. Margolis says. If the parent may need to rely on Medicaid to cover future nursing home costs, the family also should consult an elder-law attorney about how to avoid the appearance of trying to hide assets.

When Sally Jackson gave up her job as a Hollywood casting director in 2007 to help her sister, Kelly, care for their mother in Texas, she decided she "couldn't move without some income." The sisters talked it over, and Ms. Jackson now earns a caregiver's salary, which she supplements by performing stand-up comedy in Austin. The sisters also hope to make a little more on "the midlife gals," fictional sisters whose caregiving escapades the Jacksons chronicle via a blog and videos (themidlifegals.com).

"Humor helps us cope," says Kelly, whose mother, Dorothy "Dee" Jackson, appears in some of the videos.

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