Care Plan Trifecta: A Multidisciplinary Approach for Person-Centered Care Planning for Persons Living with a Dementia Diagnosis of AD/ADRD and Caregivers

Katie Brandt, MM[1], Amy M. Almeida, MS, PhD[1] and Brad C. Dickerson, MD[1]

(1) Frontotemporal Disorders Unit, Department of Neurology, Massachusetts General Hospital and Harvard Medical School, Boston, MA, USA

ALZHEIMER'S ASSOCIATION | AAIC 25

106479

Background

Persons living with a diagnosis (PLWD) of Alzheimer's disease or related dementia (AD/ADRD) and their caregivers (CGs) commonly report feeling unsure of next steps after receiving a diagnosis. Clinicians are viewed as trusted experts to provide guidance for care planning but often have limited time for care management and insufficient knowledge of PLWD needs outside of medical management.

Person-centered planning (PCP) is a process for selecting and organizing the services and supports that an older adult or person with a disability may need to live in the community. Most important, it is a process that is directed by the person who receives the support.

Methods

As a part of a larger Caregiver Support Program offered through the Massachusetts General Hospital (MGH) Frontotemporal Disorders (FTD) Unit, a framework was developed to organize the issues that should be considered in care planning. The Care Plan Trifecta provides a framework for person-centered care planning that identifies specific needs of the PLWD and CGs, prioritizes personhood and dignity, balances independence with safety, and recognizes goals of care at every stage.

The Care Plan Trifecta focuses on three domains considered from the perspective of communities: medical, home and patient advocacy. Medical community emphasizes an interdisciplinary medical team and communication between providers to promote continuity of care. Home community encourages connections with local service providers for legal, financial, and activity planning, community-based programs to access adult day health programs, in-home personal care, respite and memory care. Patient advocacy community provides support groups, education and advocacy opportunities to propel funding and social policy for AD/ADRD research, care and services forward.

www.FTDBoston.org
Katherine.Brandt@mgh.harvard.edu

Person-Centered Care Planning

Person-centered care planning is a collaborative approach to developing care plans that prioritizes the individual's needs, preferences, and goals. It shifts the focus from a standardized or one-size-fits-all approach to a tailored plan that reflects the individual's unique circumstances and aspirations. This means actively involving the person receiving care in the planning process, ensuring their voice is heard and their values are respected. When developing a person-centered care plan for a PLWD it is critical to involve a care partner from the beginning.

Centers for Medicare & Medicaid Services, www.cms.gov/priorities/innovation/key-concepts/person-centered-care

Pillars of the Care Plan Trifecta

Medical Community

Establishing a connection with expert medical providers is the first step in obtaining an accurate diagnosis for people experiencing cognitive changes. Early and accurate diagnoses create opportunities to discuss options for treatment, research engagement and future care needs. Patients and caregivers benefit when care providers across disciplines are connected to provide input for care planning. Providers in the medical community include but are not limited to primary care physicians, neurologists, psychologists, speech language pathologists, social workers, mental health providers and hospice practitioners.

Home Community

All care does not happen in the clinic. Persons living with a diagnosis, caregivers and families benefit from connections to local experts and organizations who can meet the non-medical needs of life lived alongside a dementia diagnosis including legal and financial planning. Providers in the home community include elder law attorneys, life care managers, companions and home health aides. Organizations that provide essential services in the home community include memory cafes, adult day health programs, memory care assisted living and skilled nursing facilities and may be managed by private companies or Area Agency on Aging partners.

Patient Advocacy Community

A referral to patient advocacy is a prescription that every healthcare provider should write after a diagnosis. Connecting with patient advocacy organizations benefits both the person living with the diagnosis and the care partner and includes access to support groups, educational events and advocacy opportunities. For persons living with AD/ADRD providers in the patient advocacy community include Alzheimer's Association, Alzheimer's Foundation of America, Association for Frontotemporal Degeneration and Lewy Body Dementia Association.

Presented with gratitude to the patients, caregivers and families who allow us to guide them in care planning each day. Funding for The Care Plan Trifecta was provided through generous philanthropic contributions to the MGH FTD Unit.

Results

The Care Plan Trifecta has been integrated into the MGH FTD Unit caregiver support program through one-on-one counseling sessions that encourage early care planning related to a variety of topics including advance care planning with consideration for individual values and culture. The Care Plan Trifecta has been presented to family caregivers, support groups, community providers and professional leaders in the field of dementia care through podcasts, in-person family education events and scientific conferences.

To enhance accessibility, a four-part *Care Plan Trifecta* webinar series was developed and presented through free livestream events. Recordings from the series are available to the public on the MGH FTD Unit YouTube Channel, youtube.com/MGHFTDUnit.

Conclusion

Persons living with a diagnosis of AD/ADRD and caregivers benefit from guidance about the elements of care planning that incorporate social and community resources beyond medical care. Clinicians and healthcare providers benefit from a framework that can be personalized to meet the unique lenses through which each PLWD and family experience their journey, including personal and family values, spiritual, cultural, geographic, and socioeconomic considerations.

Discussion

Research is necessary to understand impact of the *Care Plan Trifecta* across dementia care stage quality of life indicators.

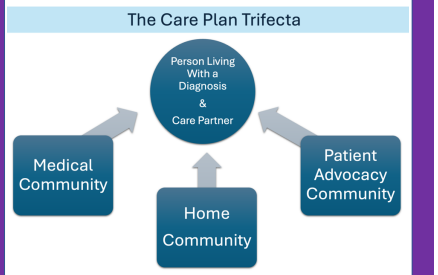

Figure 1 The Care Plan Trifecta is a framework to help healthcare providers develop a person-centered care plan that centers on the person living with a diagnosis, their care partner and community by unifying healthcare with community resources, personal values and goals of care.

View The Care Plan Trifecta Webinar Series:

Module 1*: Introduction & The Medical Community*
Module 2*: Beginning the Journey & The Home Community*
Module 3*: Expert Guidance for Non-Medical Care Planning: Connecting with the Home Community (Part 2)*
Module 4*: Raising Your Voice & The Patient Advocacy Community*

References

American Geriatrics Society Expert Panel on Person-Centered Care. Person-Centered Care: A Definition and Essential Elements. J Am Geriatr Soc. 2016 Jan;64(1):15-8. doi: 10.1111/jgs.13866. Epub 2015 Dec 2. PMID: 26626262.

Sun Y, Ji M, Leng M, Li X, Zhang X, Wang Z. Comparative efficacy of 11 non-pharmacological interventions on depression, anxiety, quality of life, and caregiver burden for informal caregivers of people with dementia: A systematic review and network meta-analysis. Int J Nurs Stud. 2022 May;129:104204. doi: 10.1016/j.ijnurstu.2022.104204. Epub 2022 Feb 12. PMID: 35247788.

Nemcikova M, Katreniakova Z, Nagyova I. Social support, positive caregiving experience, and caregiver burden in informal caregivers of older adults with dementia. Front Public Health. 2023 Jan 25;11:1104250. doi: 10.3389/fpubh.2023.1104250. PMID: 36761127; PMCID: PMC9905841.

Qian Y, Pomeroy ML, Petchler CM, Abshire Saylor M, Cudjoe TKM, Ornstein KA. The epidemiology of social isolation and loneliness among family and unpaid caregivers of older adults: Findings from the National Study of Caregiving. J Gerontol B Psychol Sci Soc Sci. 2025 May 24:gbaf101. doi: 10.1093/geronb/gbaf101. Epub ahead of print. PMID: 40411495.

Yuan S, Zhang F, Pu L, Lv J, Xie XF, Lin L, Qiu M, Huang L, Jiang W, Zhu J, Wei L. Social support interventions for caregivers of older adults with dementia: a scoping review. BMJ Open. 2025 Jun 3;15(6):e095815. doi: 10.1136/bmjopen-2024-095815. PMID: 40461148; PMCID: PMC12142170.