

Caregiver Evaluation & Selection Worksheet

An educational planning tool to help Family Animal Parents thoughtfully evaluate caregivers and guardians.

Family Animal Parent Information

Family Animal Parent Name

Family Animal Name(s)

Date Completed

Primary Caregiver Evaluation

Full Name

Relationship to Family Animal Parent

Phone

Email

Address

Role (Emergency / Backup / Long Term Guardian)

Capacity Assessment

- ☐ Has the financial ability to provide care
- ☐ Has suitable housing for the Family Animal
- ☐ Has time availability for daily care
- ☐ Able to manage medical needs and medication

Notes

Compatibility Assessment

- ☐ Has an existing relationship with the Family Animal
- ☐ Familiar with daily routines
- ☐ Experience with similar animals

Notes

Proximity Assessment

- ☐ Able to respond quickly in an emergency
- ☐ Has reliable transportation
- ☐ Has home access (key, code, or arrangement)

Notes

Willingness Assessment

- ☐ A clear yes has been received
- ☐ Expectations have been discussed in advance
- ☐ Comfortable with the level of responsibility

Notes

Stability Assessment

- ☐ Stable housing situation
- ☐ Stable employment situation
- ☐ Family situation supports caregiving
- ☐ Likely to maintain long term commitment

Notes

Backup Caregiver Evaluation**Full Name****Relationship to Family Animal Parent****Phone****Email****Address****Role (Emergency / Backup / Long Term Guardian)****Capacity Assessment**

- ☐ Has the financial ability to provide care
- ☐ Has suitable housing for the Family Animal
- ☐ Has time availability for daily care
- ☐ Able to manage medical needs and medication

Notes**Compatibility Assessment**

- ☐ Has an existing relationship with the Family Animal
- ☐ Familiar with daily routines
- ☐ Experience with similar animals

Notes**Proximity Assessment**

- ☐ Able to respond quickly in an emergency
- ☐ Has reliable transportation

☐ Has home access (key, code, or arrangement)

Notes

Willingness Assessment

- ☐ A clear yes has been received
- ☐ Expectations have been discussed in advance
- ☐ Comfortable with the level of responsibility

Notes

Stability Assessment

- ☐ Stable housing situation
- ☐ Stable employment situation
- ☐ Family situation supports caregiving
- ☐ Likely to maintain long term commitment

Notes

Caregiver Comparison Scorecard

A simple, objective way to compare multiple potential caregivers using the Five Question Framework. Rate each potential caregiver from 1 to 5 in each category.

Scoring Scale

- | | |
|---|---------------------------------|
| 1 | Poor Fit |
| 2 | Needs Significant Consideration |
| 3 | Acceptable |
| 4 | Strong Candidate |
| 5 | Excellent Candidate |

Evaluation Categories

- | | |
|----------------------|--|
| Capacity | Time, housing, financial resources, physical ability, and ability to manage care needs. |
| Compatibility | Existing relationship with the Family Animal, familiarity with routines, and ability to provide a comfortable environment. |
| Proximity | Ability to reach the Family Animal quickly and provide timely assistance during an emergency. |
| Willingness | Clear agreement to serve in the role and willingness to accept responsibility. |
| Stability | Likelihood that the person's living situation, family circumstances, and long term plans support ongoing care. |

Scorecard

Write each candidate's name in the header, then enter a score from 1 to 5 in each box.

Category	Caregiver A	Caregiver B	Caregiver C
Capacity			
Compatibility			
Proximity			
Willingness			
Stability			

Total Score			
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Notes**Strengths**

Potential Concerns

Additional Discussion Needed

Selection Recommendation

Important reminder: The best caregiver is not always the highest scoring caregiver. Personal knowledge of the Family Animal, willingness to serve, and alignment with the Family Animal's best interests should always be considered.

Conversation Checklist

Use this checklist to guide your conversation with a potential caregiver.

- ☐ Explained the role and what is being asked
- ☐ Confirmed willingness with a clear yes
- ☐ Discussed daily routines and care expectations
- ☐ Discussed medical needs and medications
- ☐ Discussed emergency response and transportation
- ☐ Discussed housing access and supplies
- ☐ Reviewed financial expectations (if any)
- ☐ Identified a backup caregiver
- ☐ Shared location of the Emergency Go Bag and key documents
- ☐ Agreed on a check in or review schedule

Caregiver Contact Information Summary

Primary Caregiver Name and Phone

Backup Caregiver Name and Phone

Long Term Guardian Name and Phone

Veterinarian Name and Phone

Review and Update Schedule

Date Completed

Next Review Date (recommended every 6 to 12 months)

Notes on changes since last review

This worksheet is for educational preparedness purposes only and should not replace veterinary, legal, or professional guidance. Consult a qualified professional in your jurisdiction for advice specific to your situation.