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What Every Employer Needs to Know

Helping Employees Balance Work and Eldercare

A Guide for Educators Working with Employers



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Introduction

Since the early 1990s, Cooperative Extension Family Living Programs in Wisconsin has been involved in educational initiatives aimed at helping individuals who provide care for dependent family members (e.g. adult children caring for elderly parents, grandparents caring for young grandchildren).

Realizing that many family caregivers work either part-time or full-time, and that it is important to encourage workplace environments to be supportive of the needs of caregivers, a team of UW-Extension educators developed an online Employed Family Caregiver Survey for use by employers. Results from the pilot testing of the Survey, together with follow-up information collected from a sample of employers, indicated the need for additional resource material for both educators and employers.

To this end, funding was secured from the Meta Schroeder Beckner Endowment in the School of Human Ecology at the University of Wisconsin-Madison, and used to produce the nine videos on the accompanying DVD, "What Every Employer Should Know: The Benefits of Understanding the Needs of Employees Involved in Caregiving".

This Guide and the accompanying DVD are intended to be useful tools that Extension educators and aging network personnel can use in working collaboratively with employers to create work environments that support the needs of employees involved in caring for elderly family members and friends. The Guide will be particularly useful for educators working with employers whose employees complete the online Employed Family Caregiver Survey posted on the national eXtension website: <http://www.extension.org/pages/27975/employed-family-caregiver-survey> (See Section 3).

In addition to this Guide and the DVD, there is also a UW-Extension website where educators may find additional resource information: ("Balancing work and Family Care of Older Persons" <http://fyi.uwex.edu/balancingcare/>). This additional resource information includes an overview of eldercare and work, handouts for employers, and summaries of reports and national surveys that may be most useful in developing workplace environments that support the needs of employed caregivers.

What Every Employer Needs to Know: Video Content

The primary purpose of the nine videos on the accompanying DVD is to serve as a catalyst in developing a partnership between employers, Cooperative Extension educators, and persons involved in the aging network; with the expectation that these partnerships will result in workplace policies, services and benefits that more effectively address the needs of employees who struggle to balance work and care of elderly family members and friends.

The videos may also be accessed via a UW-Extension website entitled, “Balancing Work and Family Care of Older Persons”: <http://fyi.uwex.edu/balancingcare/>

The content of the first video is intended to be a brief overview of caregiving and its impact in workplace settings. The remaining videos on the DVD, however, are not designed to be viewed sequentially.

Extension educators should become familiar with the content of the videos so that they may share them in ways that best fit an employer’s needs and/or Survey outcomes. Listed below is the title, length, and a brief description for each video.

Employees and Caregiving: An Overview

Length: 5:42

The combined demands of work and family caregiving responsibilities pose serious consequences for employees, who risk loss of income, emotional and physical health; and employers, who risk losing billions of dollars each year due to lost productivity. This video defines family caregiving, describes its effect on American business, and highlights the importance of providing workplace support to employees with caregiver responsibilities.

Impacts of Caregiving on Workplace Performance

Length: 4:36

Replacing employees, employee exhaustion, inability to focus (“presenteeism”), workplace disruptions and unpaid leave are just some of factors that contribute to the nearly \$34 billion dollar loss in annual productivity to American business due to employee caregiving. Three employed caregivers tell their stories of how caregiving affected their work performance.

Symptoms of Caregiver Burnout

Length: 5:43

Prolonged, intense caregiving can lead to depression, chronic insomnia and other serious physical and emotional disorders. Three employed caregivers discuss how their caregiving experiences affected their physical and emotional well-being.

Examples of Workplace Supports for Employed Caregivers

Length: 4:05

What kinds of support can employers provide for their employees to keep them healthy and productive? Two employees explain what their employers provided for them, and a caregiver support specialist discusses the employer's role in providing workplace support.

The Employed Family Caregiver Survey: A Tool for Employers

Length: 5:37

Without knowing the depth of their employees' caregiving responsibilities, employers cannot develop strategies to support them. UW-Extension Family Living Educators discuss an effective and easy-to-use online survey tool that measures employee involvement in family caregiving, and provides important information useful to employers.

Employers Benefit from Supporting Employed Caregivers

Length: 8:19

How do employers benefit from promoting and creating workplace environments, that are caregiver-friendly? Three human resource professionals describe the variety of supports they provide to employees, and why it's mutually beneficial to do so.

Diversity in Caregiving: African American Caregivers

Length: 3:12

There are significant differences in the way people in other cultures take care of their elders. African American families generally will not place their family in long-term care facilities. A family caregiver talks about these differences.

Diversity in Caregiving: LGBT Caregivers

Length: 6:05

Lesbian-Gay-Bisexual-Transgender individuals experience widespread societal discrimination. Fearing negative repercussions of disclosing their sexual identity to employers and health care professionals, LGBT community members prefer to seek help and support from their own “chosen” families. An LGBT advocate discusses how these tight-knit families care for each other and ways employers can be supportive.

Supporting Caregivers Working in Non-Profit Organizations

Length: 3:54

Non-profit organizations generally do not have the financial resources to offer employee assistance programs to their employees or volunteers. This video describes how non-profits benefit by providing their employees a variety of informal supports resulting in reduced turn-over and maintaining high productivity and morale.

Table of Contents

Introduction	i
What Every Employer Needs to Know: Video Content	ii

1 Section 1: Building a Relationship with Employers	1
Why is This Topic Important?	2
Tips on Reaching Employers	3
Tips on Working with Employers.	4

2 Section 2: Understanding the Needs of Working Caregivers	9
What are the Primary Needs of Working Caregivers?	10
Flexibility	10
Information and Assistance	10
Emotional Support	11
Tangible Assistance	11

3 Section 3: Using the Employed Family Caregiver Survey	13
The Employed Family Caregiver Survey Website.	14
The Employed Family Caregiver Survey.	15
Directions for Using the Survey	21
Registering for Access to the Survey	21
Follow-up Meeting With the Employer: Review Survey Results.	22
Assessing the Impact(s) of Participation in the Survey.	23
Follow-up Interview Questions.	24
Conducting a One-year Follow-up Interview	27
One-year Follow-up Interview Questions	28

4	Section 4: Responding to Caregivers' Needs	31
	EEOC "Best Practices"	32
	Government Responses to the Needs of Employed Caregivers	33
	Workplace-Based Supports for Employed Caregivers	35
Appendix		51
	Resources Available on the "Balancing Work and Eldercare" Website	52

Building a Relationship with Employers 1

SECTION OUTLINE

- Why is This Topic Important?
- Tips on Reaching Employers
 - Establish an advisory council
 - Host focus groups
 - Form consortia
- Tips on Working with Employers
 - Conduct a needs assessment of employees
 - Provide training
 - Encourage employers to publicize existing supports for caregivers
 - Be aware of employer's concerns
 - Assess the effectiveness of any programs or services that are initiated

2 | SECTION 1: BUILDING A RELATIONSHIP WITH EMPLOYERS

Julia, age 55, works full-time for a non-profit organization located in a large metropolitan area in the Upper Midwest. She also provides care for her 84-year-old widowed mother. A little over a year ago, Julia's mother fell, breaking her hip and fracturing a wrist. Subsequent rehabilitation was slow. The end result was that her mother will likely never regain the level of independence she had prior to the fall. Because her mother now requires more care, Julia has had a difficult time doing both her work and helping her mother. Julia reduced her hours, but that adjustment was not enough. She also finds it increasingly more difficult to stay focused on work, and has often had to coordinate care management by making phone calls from her office. The gap between work and caring for her mother has widened, to the point where Julia is experiencing adverse impacts on her own health, and is seriously considering leaving her job to care for her mother on a full-time basis.

Why is This Topic Important?

It is estimated that one in six Americans who work full- or part-time report assisting with the care of an elderly or disabled adult family member, relative, or friend. As illustrated in the vignette above, these caregivers do not abandon their caregiving responsibilities because of work. Instead, they cope as best they can to balance what are often conflicting sets of responsibilities.

As family caregiving demands increase, however, there is a higher likelihood of adverse impacts on work performance, as well as negative effects on the well-being of the caregiver; particularly for women. Findings from both international and domestic studies indicate that family caregivers reduce hours of paid work more than is the case for the general population, and those persons with the most intense caregiving responsibilities – mostly women – are significantly more likely to withdraw from the labor market entirely.

In July 2011, Gallup released data from 2,805 persons who self-identified as employed caregivers. The majority reported that caregiving has impacted their performance at work. Caregivers in the 2010 Gallup survey reported missing an average of 7 days each year due to caregiving. This magnitude of missed work translates into an estimated loss of 120 million workdays each year, and the equivalent of \$25.2 billion in lost productivity. If caregivers who work part-time were to be included in this estimate, the cost of absenteeism due to caregiving responsibilities would be much higher.

There are several reasons why employers should consider providing family-friendly work-based supports. Among them are the following:

- ♦ to increase the attractiveness of the organization to prospective applicants, improving the overall recruitment of employees, especially during tight labor markets;
- ♦ to have more loyal and happy employees; and
- ♦ to help employees better manage the stress that they experience from competing demands, leading them to be more effective employees.

This section of the Guide is designed to help educators establish relationships with employers for the purposes of providing educational opportunities and resources to employed caregivers.

Before contacting employers, you may want to view the first video, which is entitled “Employees and Caregiving: An Overview”

This video defines family caregiving, describes its effect on American business, and highlights the importance of employers providing support to their employees with caregiver responsibility.

Tips on Reaching Employers

Establish an advisory council

To identify the most suitable ways of approaching and working with local employers, as well as the most appropriate persons with whom to work, you are encouraged to work with others to establish an Advisory Council. Such a council could be comprised of local business leaders (e.g., owners, chief executive officers, chief financial officers, vice presidents for human resources or employee benefits, board chairpersons), owners of firms of employee assistance professionals (EAPs), members of the local chapter of the Society for Human Resource Management, and/or members of the Alliance of Work/Life Professionals (AWLP). Council members can be identified through queries to existing contacts in the business community, telephone calls to the local Chamber of Commerce, to EAP companies listed in the telephone book, EAP Professionals Association (<http://www.eapassn.org/i4a/pages/index.cfm?pageid=1>), and through the SHRM (www.shrm.org) or AWLP’s Website (www.awlp.org).

4 | SECTION 1: BUILDING A RELATIONSHIP WITH EMPLOYERS

Host focus groups

Another way to identify ways of working with local employers (or to select members for the Advisory Council) would be to hold a series of focus groups with representatives from the above groups. One or more focus groups could be held with each stakeholder group (e.g., CEOs, human resource managers) to identify their suggestions and concerns. Representatives from the different groups could then be selected to serve on the Advisory Council or may lead to partnerships with local employers.

Form consortia

Some activities or services, such as caregiver fairs, educational seminars, or support groups, require a certain number of caregivers in order to be maximally effective, with regard both to cost and substance. To achieve adequate numbers of employed caregivers (or anticipatory caregivers) who could benefit from such services, aging network organizations can contact small business owners who are in close geographic proximity to one another and offer to provide services to them as a group. This will result in cost savings for employers, as well as increasing the usefulness of the services for employed caregivers and enhancing contacts among them to minimize feelings of isolation.

At the same time, it is important to be aware of and address structural barriers that can impede the formation of partnerships or consortia. These barriers include organizational differences based upon the culture, language and norms of the organizations involved.

Tips on Working with Employers

Conduct a needs assessment of employees

Assessing caregiver needs is an important first step in being able to create a workplace environment in support of working caregivers' needs. One of the most effective ways to conduct this assessment is through the online Employed Family Caregiver Survey developed by a team of educators with the University of Wisconsin Extension Family Living Programs. The Survey is designed to:

- ◆ help employers and employees understand how family caregiving is impacting work;
- ◆ define the scope and needs of employed caregivers;

- ♦ identify ways employers can support family caregivers through educational outreach (i.e. employee newsletters, fact sheets, lunchtime seminars, etc.);
- ♦ provide data and report templates, which are customized to the employer and can be shared with employees and used in discussions; and
- ♦ Guide employers in making changes in organizational policies and benefits.

An overview of caregiver needs appears in Section 2 of this Guide, and directions for using the online Employed Family Caregiver Survey are in Section 3. One of the videos on the accompanying DVD also contains information on using the Employed Family Caregiver Survey (see “The Employed Family Caregiver Survey: A Tool for Employers.”)

Provide training

Training programs can be offered for managers in individual companies and also through local human resource, work-life, and health and wellness professional associations (e.g., Society of Human Resource Managers).

At the same time, it is important to note that training alone is not likely to be effective in modifying attitudes and practices within a work setting. True organizational commitment to a change in workplace culture with respect to family friendliness is required to address both attitudes and practices. Improvements in job quality and supportive working conditions, although not necessarily seen as “eldercare benefits,” are the first steps for employers who want to design policies and benefits that promise the returns of retention, commitment, and productivity of their workforce.

Encourage employers to publicize existing supports for caregivers

Employed caregivers are often not aware of benefits available to them through their employer. Through direct or sustained communication, these benefits are more likely to be accessed and used by caregivers. It is also important that employers be aware of government programs and best practices designed to help employed caregivers.

6 | SECTION 1: BUILDING A RELATIONSHIP WITH EMPLOYERS

Be aware of employer's concerns

In order to work effectively with employers, it is important for an educator be aware of potential barriers, such as:

- ◆ concerns about the costs of providing workplace programs;
- ◆ a lack of information about low- or no-cost eldercare program strategies;
- ◆ a mistaken belief that because employees have not requested them, employees have no need for eldercare-related programs or services; and
- ◆ a lack of evaluative research demonstrating the efficacy of eldercare programs.

Assess the effectiveness of programs or services initiated

If, after an assessment of caregiving has been conducted, follow-up programs are initiated by the educator, it is important to gather data at the beginning of programs and periodically throughout their provision, so that concrete evidence of their benefits can be presented for evidence of public value.

Notes

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8 | SECTION 1: BUILDING A RELATIONSHIP WITH EMPLOYERS

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Understanding the Needs of Working Caregivers 2

SECTION OUTLINE

- What are the Primary Needs of Working Caregivers?
 - Flexibility
 - Information and Assistance
 - Emotional Support
 - Tangible Assistance

What are the Primary Needs of Working Caregivers?

“Managing both work life and family life has become a major issue for a large and growing number of family caregivers and their employers. With the aging of the Baby Boom generation will come a dramatic increase in the long-term care needs of our population. As policy-makers consider our options for meeting these needs, supporting working caregivers takes on national importance.” – Margaret Neal and Donna Wagner

There are four areas of need that have implications for structuring workplace settings and providing support for caregivers: (a) flexibility, (b) information and assistance, (c) emotional support and (d) tangible assistance. Each area is described below.

Flexibility

Employed caregivers routinely note the importance of both flexible work hours and being able to take unscheduled time off to handle caregiving responsibilities when needed. A recent study of working “sandwich generation” couples (e.g. those raising depending children and caring for aged parents) found that couples who felt they had work schedule flexibility experienced less work-family conflict. Work schedule flexibility and other work-based supports offered by employers to their employed caregivers have generally been perceived positively on the part of the caregivers. This, in turn, has led to increased loyalty and satisfaction with those employers.

Information and Assistance

The needs of employed caregivers vary according to the care situation and the needs of the care recipient. Regardless, however, just as do their non-employed counterparts, employed caregivers need information on the community services that are available to support the needs of elders. Most caregivers of elders have had little or no previous experience either with providing care to an elder or with negotiating the aging services system. Thus, information about caregiving, health conditions, and where to turn for help is a critical need for employed caregivers. Because of the complexity of many elders’ health care situations, employed caregivers, like other caregivers, can find it difficult to know even what is needed, let alone decide which service approach is best for their elder. Professional expertise can be invaluable for assessing the elder’s needs, providing referrals and advice, determining eligibility and payment options, and packaging the needed services.

Emotional Support

Emotional support for employed caregivers can come in the form of support from co-workers and supervisors at the workplace, support from other family members, and support from friends. A recent study found that, not surprisingly, lower levels of family-related supervisor support were associated with higher levels of work-family conflict. Similarly, a less supportive workplace culture was also associated with work-family conflict.

Tangible Assistance

Employed caregivers need help with legal, financial, and health insurance matters and the paperwork associated with these. Helping an elder manage the paperwork associated with his or her medical care is a daunting task. Similarly, securing and completing the legal forms for durable power of attorney, wills, reverse mortgages, and the like can be frustrating and time-consuming.

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Notes

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Using the Employed Family Caregiver Survey 3

SECTION OUTLINE

- The Employed Family Caregiver Survey Website
- The Employed Family Caregiver Survey
- Directions for Using the Survey
- Registering for Access to the Survey
- Follow-up Meeting With the Employer: Review Survey Results
- Assessing the Impact(s) of Participation in the Survey
 - Follow-up Interview Questions
 - Conducting a One-year Follow-up Interview
 - One-year Follow-up Interview Questions

The Employed Family Caregiver Survey Website

The Employed Family Caregiver Survey was designed to serve as an effective means of helping employers and Extension educators collect data on:

- ◆ the extent to which employees are involved in caregiving,
- ◆ the impact(s) of caregiving on workplace performance, and
- ◆ the educational/informational needs of caregivers.

<http://www.extension.org/pages/27975/employed-family-caregiver-survey>



Survey results should make employers more aware of employed caregiving issues, and encourage the development, adoption, and implementation of workplace supports that would accommodate the needs of employed caregivers.

This section of the Guide describes how local Extension educators and personnel associated with the aging network (e.g. Aging Disability Resource Center (ADRC) staff) can use the Survey in working with local employers to foster awareness of caregiving issues in the workplace.

View video - “The Employed Family Caregiver Survey: A Tool for Employers”

Employed Family Caregiver Survey

The Employed Family Caregiver Survey will collect data to provide information about family caregiving to your employer. Results will be shared with your employer and they may be used in academic journals and other research. There are no known risks to you to take this survey. You must be at least 18 or older (19 or older in Nebraska and Alabama) to participate. Your answers to the questions are anonymous. Any reports prepared will be released only as summaries in which no individual's answers can be identified. This survey is voluntary. You are free to decide not to participate and can withdraw at anytime without harming your relationship with the researchers or institutions involved. This survey is approved by the University of Nebraska Institutional Review Board (#200608523 EP).

If you are willing to participate in the survey, please answer the questions below. This survey will take less than 10 minutes to complete.

Please put a mark in the box next to your answers.

1. Have you provided any of the following tasks for an adult (18 years or older) family member or friend who is chronically ill, disabled, aged, or frail in the past 6 months? Check all that apply

YES

- ☐ Driving to doctor appointments or other services
- ☐ Arranging or preparing meals
- ☐ Grocery shopping
- ☐ Assisting with home maintenance, repairs or yard work
- ☐ Providing personal care (bathing, dressing, feeding)
- ☐ Completing forms or documents (legal, insurance)
- ☐ Assisting with bill payment
- ☐ Arranging services for a long distance friend or relative
- ☐ Housekeeping tasks (cleaning, laundry)
- ☐ Assisting with medications (setup, dosing)
- ☐ Providing cash to pay their bills

If you answered "YES" to any of the above items, please go to Question 2.
If you did not check any boxes in Question 1, please go to Question 15.

You are a caregiver! The following questions are about your caregiving experience.

2. For how many adults do you currently provide care?

- | | |
|--------------------------------|---------------------------------------|
| <input type="checkbox"/> One | <input type="checkbox"/> Four |
| <input type="checkbox"/> Two | <input type="checkbox"/> Five or More |
| <input type="checkbox"/> Three | |

If you care for more than one person, please think of the person for whom you provide the most care when responding to the following questions.

3. Is the person you are providing care for a:

- | | |
|--|---|
| <input type="checkbox"/> Parent or Parent-in-Law | <input type="checkbox"/> Grandparent |
| <input type="checkbox"/> Brother or Sister | <input type="checkbox"/> Other Relative |
| <input type="checkbox"/> Spouse | <input type="checkbox"/> Friend |
| <input type="checkbox"/> Adult Child | <input type="checkbox"/> Neighbor |

4. Are you the primary caregiver for the individual indicated above?

- ☐ Yes ☐ No

5. Does this person have a memory impairment, such as Alzheimer's Disease or another form of dementia?

- ☐ Yes ☐ No

6. Where does the person for whom you have caregiving responsibility live?

- | | |
|--|---|
| <input type="checkbox"/> With you | <input type="checkbox"/> With another family member |
| <input type="checkbox"/> In own residence | <input type="checkbox"/> With an unrelated person, such as a friend |
| <input type="checkbox"/> In a care facility (nursing home, assisted living facility, etc.) | <input type="checkbox"/> Other (please specify) |

7. How far from you does the person for whom you have caregiving responsibility live?

- ☐ Less than an hour away ☐ One hour or more away

8. How long have you been providing care for this person?

- ☐ Less than one year ☐ 11 - 15 years
☐ 1 - 5 years ☐ 16 years or more
☐ 6 - 10 years

9. In a typical week, about how many hours of care do you provide for this person?

- ☐ 0 - 7 hours per week ☐ 15 - 21 hours per week
☐ 8 - 14 hours per week ☐ 22 hours or more per week

10. Do you think you will be able to continue providing care for the individual as long as it is necessary?

- ☐ Yes, with the same help I currently receive ☐ No
☐ Yes, but with additional help ☐ Not sure

11. When was the last time you were able to take a vacation that allowed you time away from your caregiving responsibilities?

- ☐ Less than 6 months ago ☐ Between 13 months - 2 years ago
☐ Between 6 - 12 months ago ☐ More than 2 years ago

12. In the past year, have your caregiving responsibilities caused you to:
Check all that apply.

YES

- ☐ Arrive at work late
- ☐ Leave work early
- ☐ Miss days of work
- ☐ Take leave of absence
- ☐ Be at work but feel unable to focus
- ☐ Use break or lunch times to arrange for caregiving services
- ☐ Respond to calls or emergencies during work hours
- ☐ Rearrange your work schedule
- ☐ Cut hours of work
- ☐ Turn down work-related travel
- ☐ Turn down a promotion
- ☐ Turn down work relocation
- ☐ Consider changing employer
- ☐ Consider leaving work entirely

13. If you missed work due to caregiving, which of the following have you used to fulfill caregiving responsibilities? Check all that apply.

- ☐ I have not needed to miss work due to caregiving
- ☐ Sick leave
- ☐ Flexible hours
- ☐ Vacation
- ☐ Personal time
- ☐ Work from home
- ☐ Time off without pay

14. Overall, has providing or arranging care for the individual you are caring for made your current employment more difficult?

- ☐ Yes ☐ No

If you answered YES above, please provide an example below.

15. Please check all of the following family caregiving topics about which you would like to learn more. Check all that apply.

- ☐ Communicating with family members
- ☐ Communicating with health care professionals
- ☐ Communicating with your supervisor and work colleagues about your family caregiving situation
- ☐ Caregiving benefits offered through your employer
- ☐ Community resources to assist with caregiving tasks and responsibilities (in-home assistance, educational classes, support groups, etc.)
- ☐ Legal, financial and/or health care planning (powers of attorney for health care and finances, guardianship, estate planning, etc.)
- ☐ Finding and hiring paid help
- ☐ Exploring residential long-term care options (nursing home, assisted living facilities and other housing options)
- ☐ Juggling work and caregiving
- ☐ Coping with caregiving responsibilities, including stress management
- ☐ Personal care skills such as bathing, transferring, and feeding
- ☐ Dealing with problem behaviors (wandering, asking same question, etc.)
- ☐ Strategies to approach difficult decisions such as taking away drivers license, needing paid help, moving to care facility, etc.
- ☐ Dealing with loss and grief
- ☐ Understanding how your relationships change throughout the caregiver journey
- ☐ Long term care insurance

16. How would you prefer to receive caregiving information if it were made available at your workplace? Check all that apply.

- ☐ Lunchtime seminars
- ☐ Before or after work seminars
- ☐ Employee newsletters
- ☐ Fact sheets
- ☐ Individual meetings with someone to help you problem solve
- ☐ Other (please specify)
- ☐ On-site support groups
- ☐ Printed directory of caregiver services
- ☐ E-mail
- ☐ Online

17. Gender

- ☐ Female
- ☐ Male
- ☐ Prefer not to answer

18. Age

- | | | | |
|---------------------------------------|----------------------------------|----------------------------------|---|
| <input type="checkbox"/> 25 and under | <input type="checkbox"/> 36 – 45 | <input type="checkbox"/> 56 – 65 | <input type="checkbox"/> 76 and older |
| <input type="checkbox"/> 26 – 35 | <input type="checkbox"/> 46 – 55 | <input type="checkbox"/> 66 - 75 | <input type="checkbox"/> Prefer not to answer |

19. Race/Ethnicity

- | | | |
|---|---|---|
| <input type="checkbox"/> American Indian | <input type="checkbox"/> White | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> Asian | <input type="checkbox"/> Two or more races | <input type="checkbox"/> Prefer not to answer |
| <input type="checkbox"/> Black or
African-American | <input type="checkbox"/> Other (please specify) | |

20. Number of years employed by organization

- | | |
|---|---|
| <input type="checkbox"/> Less than one year | <input type="checkbox"/> 21 - 25 years |
| <input type="checkbox"/> 1 - 5 years | <input type="checkbox"/> 26 - 30 years |
| <input type="checkbox"/> 6 - 10 years | <input type="checkbox"/> 31 years or more |
| <input type="checkbox"/> 11 - 15 years | <input type="checkbox"/> Prefer not to answer |
| <input type="checkbox"/> 16 - 20 years | |

Thank You for Completing This Survey!

Directions for Using the Survey

The instructions provided in this Guide are a basic overview. However, in the national eXtension site (<http://www.extension.org/pages/27969/employed-family-caregiver-survey-report-tools>) is a 12-page pdf document titled, "Instructions for Implementing the Employed Family Caregiver Survey". This document includes very detailed instructions. (See the item circled below).

In this instructional document you will find additional information related to what you might discuss with an employer related to the survey, reports available, and an explanation that the service is free; however, it will take some employee time to complete. Be sure to share that the data from their organization will become part of a national data base and that it may be used in writing academic papers, but the workplace survey data will only be shared at the report level without any individual respondent's identifying information.

Registering for Access to the Survey

The Employed Family Caregiver Survey is available on the national eXtension website: <http://www.extension.org/pages/27975/employed-family-caregiver-survey>. The Survey Coordinator (an extension educator or individual from the aging network) may go to the National eXtension website (noted above) and open the online registration form in the text or directly at: <http://www.extension.org/pages/27970/employed-family-caregiver-survey-registration-form>.

Some of the information to complete the form will come from the employer. All of the information should be prepared before accessing the registration form.

1. Survey Coordinator section: Name and contact information of survey coordinator for this employer. If you are a county educator, use your contact information for the Survey Coordinator section.
2. Employer/Organization section: Employer/Organization name, address and phone number.
3. Employer/Organization section: Number of individuals employed by this Employer/Organization that will be given the survey link. (Survey will close when this number is reached.)
4. Employer/Organization section: Date the survey will be distributed. (Survey will remain open for 6 weeks from this date)

This information is used to create a unique URL for the employer (which is the link to the survey). Within one week, the Survey Coordinator will receive an e-mail with the unique URL for the employer. The Survey Coordinator then sends this unique link via email to the employer contact for distribution or directly to the employees (with permission of the employer) so they can complete the survey.

For best results management should support the completion of the survey by employees on work time using work computers. This should be shared when the link is sent to employees along with telling them that the survey is confidential and approved by administration.

For those who do not have access to a computer, a paper version of the survey is available at: http://www.extension.org/sites/default/files/w/3/39/employedfamilycaregiversurvey_printversion.pdf. In order to keep paper copy responses confidential, a collection system will need to be created that protects the respondents' anonymity.

The Survey can remain open for up to six weeks. Before it is closed, the survey coordinator (extension educator) or an alternate (volunteer) must input information from the paper copies of the survey into the data base system using the URL link. In order to maintain the confidentiality of the survey responders, this should NOT be an employee.

Within in one week from closing, the Survey data will be sent to the survey coordinator. The data will include responses for each question and an easy bar chart to visualize the responses as well. This will be used to generate reports for the employer.

Follow-up Meeting With the Employer: Review Survey Results

The survey results have been used to generate a report for the employer, schedule a time to meet with the employer's representative; that is, the person with whom you worked to register the employer for the Survey. Others may be invited to join the discussion as well. During this meeting, review and discuss the results of the Survey. You may want to particularly discuss the sections of the Survey's results that focus on topics of interest to working caregivers, and the format in which working caregivers would prefer to receive additional information. If, for example, one of the topics identified was coping with caregiving responsibilities, including stress management, and if "seminars" were identified as a desired format for receiving this information, you may want to discuss offering the Powerful Tools for Caregivers curriculum (<http://fyi.uwex.edu/familycaregivereducation/>) to employees involved in caregiving. If "fact sheets" and/or "newsletters" were identified as a preferred format for delivering information, consider adapting material available from the website sponsored by the National Alliance for Caregiving (<http://www.caregiving.org/>), or website from the Family Caregiver Alliance/National Center on Caregiving: <http://www.caregiver.org/caregiver/jsp/publications.jsp?nodeid=345>

Assessing the Impact(s) of Participation in the Survey

One of the MOST IMPORTANT things to do after the Survey has been administered is to assess the impact(s) on the employer. This is done at two points in time. The first is when the results of the Survey are shared with the employer. The second is approximately one-year later. Copies of both interviews appear on the next few pages.

Note that these interviews may also be downloaded from the UW-Extension FYI website: <http://fyi.uwex.edu/balancingcare/>

The results of each interview (that is, the one administered when Survey results are shared with the employer, and the one administered one-year later) should be sent to:

Teri Zuege-Halvorsen, MS
Family Living Educator
Manitowoc County UW-Cooperative Extension
4319 Expo Drive
P.O. Box 935
Manitowoc, WI 54221
Voice: (920) 683-4168
Email: teri.zuege-halvorsen@ces.uwex.edu

Questions should also be directed to Teri Zuege-Halvorsen.

Follow-up Interview (when Survey results are shared)

Date: _____ Interviewer: _____

Position of person interviewed: _____

Workplace (name of company/organization/agency): _____

Approximate number of employees completing the Survey: _____

As you know, employees at NAME OF EMPLOYER/WORKPLACE completed the Employed Family Caregiver Survey, which is designed to collect information on the experience of balancing work and caring for a family member who is frail and elderly (e.g. an older parent). After employees completed the survey, a report was generated that showed the response percentages to survey questions. The purpose of this interview to learn what may have occurred at NAME OF EMPLOYER/WORKPLACE as a result of the survey's findings. You were selected because you are familiar with the survey and its results.

1. Which of the following statements best describes the general response by human resource personnel who read the final report?

- ☐ The number and percentage of employees involved in eldercare was much higher than expected
- ☐ The number and percentage of employees involved in eldercare was a little higher than expected
- ☐ The number and percentage of employees involved in eldercare was about the same as expected
- ☐ The number and percentage of employees involved in eldercare was a little lower than expected
- ☐ The number and percentage of employees involved in eldercare was much lower than expected

2. For persons at NAME OF EMPLOYER/WORKPLACE who know about employee benefits (example: persons working in human resources), to what extent did the survey's results increase awareness of issues faced by employees who balance work and eldercare?

Significantly increased awareness 5 4 3 2 1 No increased awareness

3. One of the items on the survey listed fourteen ways that caring for an elderly loved one might impact work. These are listed below. Check the impacts of which you were unaware until after the results of the survey were made available.

- ☐ Rearrange work schedule
- ☐ Arrive at work late
- ☐ Leave work early
- ☐ Miss days of work
- ☐ Take leave of absence
- ☐ Be at work, but feel unable to focus
- ☐ Use break or lunch times to arrange for caregiving services
- ☐ Respond to calls or emergencies during work hours
- ☐ Reduce hours of work
- ☐ Turn down work-related travel
- ☐ Turn down a promotion
- ☐ Turn down work relocation
- ☐ Consider changing employer
- ☐ Consider leaving work entirely

4. List and briefly describe any impacts of caregiving on work you have observed, but are not among the fourteen listed above.

5. Listed below are several workplace supports that might be helpful to employees who simultaneously juggle work and caring for an elderly loved one. For each support, please indicate (a) whether it is offered at NAME OF EMPLOYER/WORKPLACE, and (b) how often it is used by employees who are caregivers.

WORKPLACE SUPPORT	OFFERED? Circle "yes" or "no"	HOW OFTEN USED BY EMPLOYED CAREGIVERS? 0 = Never 1 = Rarely 2 = Sometimes 3 = Frequently
• Flexible work hours	Yes No	0 1 2 3
• Job sharing	Yes No	0 1 2 3
• Option to work at home/telecommute	Yes No	0 1 2 3
• Unpaid leave to care for a family member	Yes No	0 1 2 3
• Personal Time Off or other paid leave which can be used to care for an elderly family member	Yes No	0 1 2 3
• Family health insurance	Yes No	0 1 2 3
• Pension/retirement plan	Yes No	0 1 2 3
• Program that allows employees to set aside pre-tax dollars to pay for care of an elderly family member (e.g. aged parent)	Yes No	0 1 2 3
• Program that allows employees to set aside pre-tax dollars to pay for care of an elderly family member (e.g. aged parent)	Yes No	0 1 2 3
• Subsidy for parent care	Yes No	0 1 2 3
• On-site adult day care center	Yes No	0 1 2 3
• Resources and referral services for elder care	Yes No	0 1 2 3
• On-site support for family-related issues	Yes No	0 1 2 3
• Seminars on balancing work and family issues, such as eldercare	Yes No	0 1 2 3
• Employee assistance program (EAP)	Yes No	0 1 2 3

6. If one of the workplace supports listed above is not currently offered or available at NAME OF WORKPLACE, please indicate the extent it is likely to be offered in the future as a result of having participated in the Employed Family Caregiver Survey.

Not very likely at all 1 2 3 4 5 Very likely

7. As a result of the Survey's results, are you planning to provide any caregiving information to employees?

- ☐ Do not know
- ☐ No
- ☐ Yes (if "yes", please describe in the space below)

Conducting a One-year Follow-up Interview

Approximately one year after you have shared the initial Survey results with the employer, re-schedule another meeting for the purpose of assessing longer-term impacts. During the one-year follow-up meeting, collect impact information by asking the following questions. Responses should be sent to the same address as the responses to the initial interview. The one-year follow-up interview questions can be downloaded from the website: <http://fyi.uwex.edu/balancingcare/>

1-Year Interview with a Representative of the Employer

About one year ago, your company/organization participated in an online Employed Family Caregiver Survey. Results of the Survey included the number of employees involved in eldercare, the impact of eldercare on workplace performance, and topics of interest to working caregivers.

1. As a result of participating in this Survey, please describe any changes in policies, benefits, and/or services offered to employees who are balancing work and the care of an older family member or friend.

2. If, during the past year, employed caregivers were offered information as a result of the Survey, please indicate the topics addressed (check as many as apply).

- ☐ Communicating with family members
- ☐ Communicating with health care professionals
- ☐ Communicating with your supervisor and work colleagues about your family caregiving situation
- ☐ Caregiving benefits offered through your employer
- ☐ Community resources to assist with caregiving tasks and responsibilities (in-home assistance, educational classes, support groups, etc.)
- ☐ Legal, financial and/or health care planning (powers of attorney for health care and finances, guardianship, estate planning, etc.)
- ☐ Finding and hiring paid help
- ☐ Exploring residential long-term care options (nursing home, assisted living facilities and other housing options)
- ☐ Juggling work and caregiving
- ☐ Coping with caregiving responsibilities, including stress management
- ☐ Personal care skills such as bathing, transferring, and feeding
- ☐ Dealing with problem behaviors (wandering, asking same question, etc.)
- ☐ Strategies to approach difficult decisions such as taking away driver's license, needing paid help, moving to care facility, etc.
- ☐ Dealing with loss and grief
- ☐ Understanding how your relationships change throughout the caregiver journey
- ☐ Long term care insurance
- ☐ Other (please list)

3. Indicate the topics on which Cooperative Extension educators helped provide helpful information (check all that apply).

- ☐ Communicating with family members
- ☐ Communicating with health care professionals
- ☐ Communicating with your supervisor and work colleagues about your family caregiving situation
- ☐ Caregiving benefits offered through your employer
- ☐ Community resources to assist with caregiving tasks and responsibilities (in-home assistance, educational classes, support groups, etc.)
- ☐ Legal, financial and/or health care planning (powers of attorney for health care and finances, guardianship, estate planning, etc.)
- ☐ Finding and hiring paid help
- ☐ Exploring residential long-term care options (nursing home, assisted living facilities and other housing options)
- ☐ Juggling work and caregiving
- ☐ Coping with caregiving responsibilities, including stress management
- ☐ Personal care skills such as bathing, transferring, and feeding
- ☐ Dealing with problem behaviors (wandering, asking same question, etc.)
- ☐ Strategies to approach difficult decisions such as taking away driver's license, needing paid help, moving to care facility, etc.
- ☐ Dealing with loss and grief
- ☐ Understanding how your relationships change throughout the caregiver journey
- ☐ Long term care insurance
- ☐ Other (please list)

Notes

[illegible]

Responding to Caregivers' Needs 4

SECTION OUTLINE

- EEOC “Best Practices”
- Government Responses to the Needs of Employed Caregivers
 - Dependent Tax Credit
 - Family and Medical Leave Act
 - Designating November as National Family Caregiver Month
 - The Eldercare Locator Program
 - The National Family Caregiver Support Program
- Workplace-Based Supports for Employed Caregivers
 - Policies
 - Services
 - Benefits

EEOC “Best Practices”

In 2007 the U.S. Equal Employment Opportunity Commission (EEOC) issued a report entitled *Employer Best Practices for Workers with Caregiving Responsibilities*. The EEOC defined best practices as proactive measures that go beyond federal non-discrimination requirements. They specifically referred to individuals working and juggling caregiving responsibilities, including elder care.

Numerous studies found flexible workplace policies enhance employee productivity, reduce absenteeism, reduce costs, and appear to positively affect profits. They also aid recruitment and retention efforts, allowing employers to retain a talented, knowledgeable workforce and save the money and time that would otherwise have been spent recruiting, interviewing, selecting and training new employees.

Some examples of best practices for employers regarding caregiving employees, according to the EEOC:

- ◆ Be aware of, and train managers about, the legal obligations that may impact decisions about treatment of workers with caregiving responsibilities.
- ◆ Develop, disseminate, and enforce a strong EEO policy that clearly addresses the types of conduct that might constitute unlawful discrimination against caregivers.
- ◆ Ensure that managers at all levels are aware of, and comply with, the organization’s work-life policies.
- ◆ Respond to complaints of caregiver discrimination efficiently and effectively. Protect against retaliation.
- ◆ If overtime is required, make it as family-friendly as possible.
- ◆ Identify and remove barriers to re-entry for individuals who have taken leaves of absence from the workforce due to caregiving responsibilities or other personal reasons.
- ◆ Review workplace policies that limit employee flexibility, such as fixed hours of work and mandatory overtime, to ensure that they are necessary to business operations.
- ◆ Work with employees to create flexible or reduced-time arrangements that may include flextime, telecommuting, or part-time work options that meet the specific needs of the employee and employer.
- ◆ Ensure that managers do not discourage employees from requesting flexible work arrangements or penalize employees who make such requests.
- ◆ Provide reasonable personal or sick leave to allow employees to engage in caregiving, even if not required to do so by the Family and Medical Leave Act.
- ◆ Develop the potential of employees, supervisors, and executives without regard to caregiving or other personal responsibilities.

The full document can be downloaded from: <http://www.eeoc.gov/policy/docs/caregiver-best-practices.html>

Government Responses to the Needs of Employed Caregivers

Dependent Tax Credit

Initiated in 1976, the federal dependent care tax credit enables qualified employed persons to deduct some employment-related dependent care expenses from taxes they paid in the previous year.

Family and Medical Leave Act

In 1993, the U.S. Congress passed the Family and Medical Leave Act (FMLA). This Act provides job protection for employees who need to take a leave of absence for the purpose of caring for a family member or for their own health care needs. The legislation applies to organizations with 50 or more employees and provides employees 12 weeks of unpaid leave to be used during a 12-month period. The leave may be taken all at once or intermittently within the 12-month period. After taking leave, the employee returns to his or her job or to a job with equivalent pay and status.

Designating November as National Family Caregivers Month

In 2000, November was designated as National Family Caregivers Month. This designation places added emphasis on formally recognizing and honoring family caregivers.

The Eldercare Locator Program

One of the most valuable resources has been the Eldercare Locator Program by the Administration on Aging (AoA). The AoA supports this nationwide, toll-free information and assistance directory, 1-800-677-1116, which helps individuals seeking assistance for relatives or friends to find the appropriate AoA services to help them. The program is staffed Monday through Friday, 9:00 a.m. to 8:00 p.m., Eastern Time. Until recently the focus of the aging services network, and Area Agencies on Aging (AoAs) specifically, was on serving elders directly, not their caregivers. <http://www.eldercare.gov/eldercare.net/public/index.aspx>

The screenshot shows the Eldercare Locator website. At the top, it says "Department of Health and Human Services" and "eldercare locator Connecting You to Community Services". The phone number "1-800-677-1116" is prominently displayed. Navigation links for "Home", "About", and "Resources" are present. A welcome message states: "Welcome to the Eldercare Locator, a public service of the U.S. Administration on Aging connecting you to services for older adults and their families. You can also reach us at 1-800-677-1116." The main section is titled "Find Help in your Community" and instructs users to "You can start your search by selecting zip code OR city/state OR topic." There are two search options: "Search by Location" with fields for "Zip Code:", "City:", and "State:", and "Search by Topic" with a dropdown menu listing services like "Alzheimer's Disease", "Caregiver", "Elder Abuse Prevention", etc. On the right side, there are links for "Resize Text", "Email Page", "Printer Friendly", "Download Reader", "Share", and "Tweet". Below these is an "Online Chat" section with a "Find us on Facebook" link and a "Have a question? Speak with an Information Specialist" offer, available Monday through Friday 9am - 8pm ET. At the bottom right, there is a "Media Spotlight" section featuring a "HOSPITAL TO HOME" program.

National Family Caregiver Support Program

The most recent governmental initiative related to employed caregivers came when the enactment of the Older Americans Act Amendments of 2000 (Public Law 106-501, Title III - Part E) established the National Family Caregiver Support Program. This program provides funding to the aging network for the explicit purpose of serving family caregivers, as well as elders. It was enacted by

Congress in response to increasing awareness of the crucial role played by family caregivers in the provision of long-term care, and it provides formal recognition of the importance of family caregivers in the overall well-being of older Americans. It should also be noted that a related program, the Native American Caregiver Support Program was also established within the Older American Act Amendments of 2000.

The National Family Caregiver Support Program provides funding for specific services for caregivers. At the same time, it opens the door for Cooperative Extension and the aging network to explore creative and alternative ways in which service offerings can support family caregivers who are employed.

Workplace-Based Supports for Employed Caregivers

Workplace-based supports for employed caregivers may be organized into three categories: policies, services, and benefits.

Policies can be thought of as the formal or informal ways in which employees' work and leave schedules are handled by an employer. Policies provide the parameters for dealing with certain situations.

Services are specific programs provided directly by or through the employer that address a particular employee need in a specific way. Services are a tangible form of help but not direct compensation. Services differ from benefits in that the employer, rather than the employee, chooses the approach (i.e., specific service) to meet a given type of need.

Benefits refer to forms of compensation, direct or indirect, that provide (a) protection against loss of earnings, (b) payment of medical expenses associated with illness, injury, or other health-care needs, or (c) paid released time for vacations or personal needs. Benefits may also include provision of payment (full or partial) for other services, such as legal, educational, or dependent-care services. This outline of the section on Policies, Services and Benefits demonstrates the many ways that employers may choose to respond to concerns identified by the Employed Family Caregiver Survey.

Policies

Workplace policies can be thought of as the formal or informal ways in which employees' work and leave schedules are handled. Policies provide the parameters for dealing with certain situations; for example, whether an employee can use his or her sick leave to care for an aging parent. Generally, except for paid leave (e.g., sick, vacation, or personal), policies involve no direct compensation or cash benefit. Various forms of paid leave are considered policies because their primary effect is added flexibility in work scheduling, not compensation related to employment.

Reviews of best practices in workplace eldercare indicate that flexibility in the structure of work (number of hours worked and how work is scheduled) is one of the most important types of workplace support that employers can provide to individuals struggling to balance work and eldercare responsibilities.

The table on the following page summarizes some of the workplace policies that offer flexibility to working caregivers. It can be used as a quick reference guide regarding the advantages and disadvantages for employees and employers. The pages that follow the table provide more information on each policy option. To be sure, this is not an exhaustive list, but it will give educators a general idea of the policy options that might be discussed with an employer.

POLICIES	ADVANTAGES TO EMPLOYER	ADVANTAGES TO EMPLOYEE
Reducing Work hours		
Part-Time Work	recruiting from a larger labor pool, adjusting the work force to fit the work load, retaining workers who might otherwise quit work, providing sufficient coverage for peak periods, and achieving higher productivity	provide needed income, additional hours to devote to caregiving, and a break from caregiving
Job Sharing	broader range of skills and experience that can be brought to a shared position, the retention of employees, and continuity should one person leave	additional opportunities for part-time work
Voluntary reduced time	alternative to layoffs and as a means of assisting employees to meet educational, family, or personal needs	particularly useful to those caring for elders undergoing crises and needing additional time and attention from their employee caregiver
Phased retirement	mentorship of new employee by person phasing out of full-time employment	a gradual transition to retirement
Options for Leave		
Sick leave expanded to Family Leave		
Personal Leave		
Vacation Leave with Flexibility		
Flexible Work Place	possibility of recruiting or retaining workers unable or unwilling to commute, improvements in productivity, reduced costs for office space	reduced commuting and greater access to their families
Flexible Work Time		
Compressed workweek	decreases in absenteeism, tardiness, and turnover; improvements in employee morale and in recruitment; improvements in staffing; include more efficient utilization of plants and equipment; reductions in labor cost per unit; reduced utility costs	allows workers an extra day or portion of a day at home; less commuting time and cost
Flextime	higher morale; increased productivity; decreased incidence of tardiness, unnecessary absences, and use of leave time; reduced overtime; facilitation of cross-training; and increased time during which the public can be served	increased control and flexibility in work schedules

Reducing the Number of Hours Worked

Hours may be reduced by working part time, sharing jobs, using voluntary reduced time (V-time) or phased retirement, and making use of various leave policies.

Part-Time Work

Employees who work part time may be temporary or permanent employees; they may work parts of days, weeks, months, or years. The advantages to employers of part-time workers include the possibilities of recruiting from a larger labor pool, adjusting the work force to fit the work load, retaining workers who might otherwise quit work, providing sufficient coverage for peak periods, and achieving higher productivity. The disadvantages to employers include extra costs due to fixed per-employee labor costs, and perceptions by employers that part-time workers are less committed to their jobs than are full-time workers.

For employees who are caregivers, working part-time instead of full-time can provide needed income, additional hours to devote to caregiving, and a break from caregiving. The disadvantages can include reduced or nonexistent benefits, reduced income (and sometimes pay scale), lower retirement income (a smaller pension and a lower income base on which Social Security benefits are calculated), and fewer opportunities for career advancement.

Job Sharing

When two persons share one full-time position, separate but related assignments, or unrelated assignments reflected on a single budget line, is another example of part-time work. The U.S. Department of Labor has noted several advantages of job sharing for employers, including the broader range of skills and experience that can be brought to a shared position, the retention of employees, and continuity should one person leave. The disadvantages for employers include resistance by managers, difficulty in evaluating individual employees whose jobs overlap, and difficulty in restructuring many jobs to enable them to be held by two people.

The primary advantage to employees is that such job-sharing programs make available additional opportunities for part-time work. The disadvantages to employees include those described above for employees working part time, especially perceived inequities in benefits.

Voluntary reduced work time (V-time)

Voluntary reduced work time (V-time) permits employees to reduce the number of hours they work (and consequently their pay) by 5% to 50% for some period of time. Benefits and seniority are retained on a prorated basis. The arrangement

may include that during some weeks more hours are worked than during others. This option has been used by employers as an alternative to layoffs and as a means of assisting employees to meet educational, family, or personal needs. V-time can be particularly useful to those caring for elders undergoing crises and needing additional time and attention from their employee caregiver. The disadvantages include those listed above for part-time work.

Phased Retirement (aka “Transitional Retirement”)

Another form of part-time work helpful for caregivers consists of phased retirement, based on years of service or age. Some phased retirement plans involve placing the retiring employee in a mentorship position and having him or her train the replacement employee. This mentorship of a new employee is an obvious advantage to employers. The primary disadvantage for employers is the cost of developing a phased retirement program, especially those that involve mentorship, and the possible need to change pension formulas. For employees, phased retirement generally means a reduced pension. Nonetheless, this option meets the needs of employees who wish to make a gradual transition to retirement. It may be especially useful for employees with eldercare responsibilities who might otherwise be forced to quit their jobs entirely as their responsibilities come to require increasing amounts of their time.

Options for Leave Policies

Options that result in a reduced number of hours worked also include leave policies. Several such policies have been formulated by employers, including sick leave, family leave, personal leave, and vacation leave. Leave may be paid or unpaid. Sick leave and short-term disability insurance protect employees from the temporary loss of income when they become ill or experience a disability that prohibits them from working.

Sick Leave expanded to Family Leave

Some employers have initiated “family illness days,” an expansion of the definition of sick leave to include time off to care for ill family members. This option recognizes that employees must sometimes take time off from work in order to provide such care. These days (typically 3 or 4 per year) may be included in employees' normal sick leave allotments, or they may represent additional days off.

“Family illness hours,” a variation on the theme of family illness days, is a leave option that allows employees to take their leave an hour at a time. This option is especially useful for caregivers of elders, who must sometimes take their elder to medical or other appointments but who do not need to take an entire day off for this purpose.

Family medical leave options, as described in the section on Government Responses to the Needs of Employed Caregivers, may involve temporary leaves of absence, paid or unpaid, for the care of an elderly and disabled family member. The Family Medical Leave Act (FMLA) protects the job of the employee while she or he is away for a specified amount of time. However, employees may be unable or reluctant to use this leave if it is unpaid or if they fear that the progress of their careers will be jeopardized.

Personal Leave

Personal leave (days or hours) is time off that may be used for whatever personal or family needs the employee may have.

Vacation Leave Flexibility

Employers may choose to combine vacation and sick leaves into flexible time-off packages that employees can use for any purpose. In addition, vacation times can be split into smaller blocks of time to provide more flexibility. The rationale is that such a leave policy formally recognizes the importance of employees' personal responsibilities and needs while conveying trust that employees will use their leave to benefit both themselves and their employer.

Flexible Workplace

Several policy options center on changing where work is performed. These options involve doing paid work at home or at some other site away from the office. They are referred to as flexplace, flexiplace, or telecommuting.

For employers, these options offer the possibility of recruiting or retaining workers unable or unwilling to commute, such as persons with disabilities, parents with young children or those with elder caregiving responsibilities. Another advantage is possible improvements in productivity because of workers' ability to do their work whenever they wish and because of fewer office-related distractions. Lastly another advantage includes reduced costs for office space if the employee is always off site.

The disadvantages of flex place options for employers include (a) the changes necessary in supervision and evaluation techniques when employees work at home, (b) resentment by employees whose jobs do not permit them to work at home, and (c) the special safeguards needed to preserve job security, pensions and other benefits, and job advancement rights of off-site workers.

Flexplace options provide several advantages for employees, including reduced commuting and greater access to those they care for. Working at home, however, may not reduce work-family difficulties if there are dependents in the household.

Additional disadvantages to employees may include increased work-family conflict due to the lack of physical boundaries between work and home, a greater risk of burnout since start and stop-times for work are not specified and the perception by their family that they are not working because they are not at an office.

Flexible Work Time

There are two main options for increasing the flexibility of employees' work schedules: a Compressed Workweek or Flextime. Both are described below.

Compressed Workweek

The compressed workweek is a work scheduling method that allows an employee to work "full-time," but in less than the standard 5 days per week, 8 hours per day. Typically, the employee works 4 longer days and either shortened hours or no hours on the 5th day.

Compressed workweeks are used most often by employers attempting either to decrease the cost of operating capital equipment or to improve the allocation of labor time. The advantages for employers may include decreases in absenteeism, tardiness, and turnover; improvements in employee morale and in recruitment; and improvements in staffing (the concentrated time off makes employees more willing to work shift and weekend assignments and to work during peak times of activity). Other advantages for employers may include more efficient utilization of plants and equipment, reductions in labor cost per unit, and reduced utility costs. Disadvantages may include low morale, fatigue or tardiness. Other disadvantages for employers may include problems with scheduling and difficulties in internal and external communication. Another difficulty is that in some states wage and hour legislation requires that employees working more than 8 hours per day be paid overtime premiums. Finally, opposition may be faced from labor unions.

For employees, a primary advantage of the compressed workweek is that it allows workers an extra day at home. Other advantages may include improved morale, more family time on the weekends, and less commuting time and cost. Another advantage to employees of the compressed workweek may be the increased opportunity to moonlight (i. e., take a second job). Disadvantages for employees may include decreased morale (for those who dislike the longer workdays) and increased fatigue (especially for some older workers and working caregivers).

Flextime

Flextime involves a work schedule with flexible starting and quitting times. There are core hours during which employees must be present. There are "flexi-hours" or "bandwidths" at the start and the end of the workday during which employees can vary their starting and stopping times. The length of the lunch hour can be varied to meet employees' needs. Starting and stopping times may be changed daily (referred to as a "sliding" or a "gliding" schedule), weekly, monthly, or, even less frequently. Finally, employees may be permitted to vary the length of their workday and to accrue time to be taken off in the future.

From an organizational standpoint, flextime schedules are humane and can develop a climate of trustworthiness. This climate can result in several advantages to the employer, including higher morale; increased productivity; decreased incidence of tardiness, unnecessary absences, and use of leave time; reduced overtime; facilitation of cross-training; and increased time during which the public can be served (due to the larger bandwidth of starting and ending times). Such changes can result in considerable savings for the organization.

The challenges of flextime for employers may include occupational constraints; specifically, flextime is not well suited to some types of jobs, such as assembly line work or other work that requires employees to function as a team, work that is supervisory, or reception work. Another challenge is that supervisors may be reluctant to implement it due to the greater complexity of scheduling and the more participatory style of supervision that flextime encourages. Legal constraints produced by laws concerning overtime and maximum hours present another difficulty for employers considering using flextime. Union resistance may be problematic as well, since some unions believe that flextime actually results in a longer work week and fewer available jobs, that it decreases the need for overtime and the availability of overtime premiums, and that it facilitates moonlighting. Still other challenges for employers include possible difficulties in communicating with and supervising employees and in covering work during the entire workday. Finally, there may be costs associated with the heating and cooling of facilities as hours of operation are extended.

Flextime is popular with employees because of the increased control and flexibility in work schedules that it affords to all employees, regardless of their family situations. It offers greater personal freedom and increased opportunities for participating in educational, recreational, social, and family activities, as well as the chance to fulfill dependent-care responsibilities and to reduce reliance on external dependent-care arrangements. An additional advantage for employees may be easier commuting.

A Note on Management Training

Management training, although not a direct form of alternative work scheduling, is an indirect and important form of assistance related to family-supportive policies. Although formal family-responsive work scheduling and leave policies may be in place, employees will not realize their intended benefits unless they are understood and appropriately implemented by supervisors and managers. Furthermore, many decisions about work schedule and leave are made informally. Managers who are not sensitive to the needs of employees who have family-care responsibilities may not allow employees the informal flexibility that can be so useful when one is attempting to manage both work and family roles.

Services

Services are a tangible form of help, but not direct compensation. These are things the employer provides and are considered a service as opposed to benefits which are part of an employee's compensation package. Employer-supported services addressing employees' dependent-care responsibilities can be organized into three categories, education, resources and direct services with varying levels of employer involvement and investment.

Education

The provision of educational and of written materials is often the first step that employers take in assisting their employees with caregiving responsibilities. Some educational methods, such as the provision of a corporate library, require minimal resources and effort. Others, such as educational seminars and caregiver fairs, are somewhat more costly and time consuming. The provision of education and written materials tends to gain visibility for the company among both employees and the outside media.

Corporate Library

Companies can include books and videotapes on caregiving in their libraries. The Travelers Insurance Companies have added such books to their library and occasionally have articles on caregiving topics in their company publications.

Educational Seminars

Many companies provide educational forums for employees. Since most employees are unprepared for the responsibilities of eldercare, seminars can provide basic information about the aging process, caregiving concerns, and

resources available. Extension educators and aging network personnel can develop and provide such seminars at the worksite. These seminars might include the curricula of such programs as Powerful Tools for Caregivers, or Share the Care.

Enhancing Internet Access

A tremendous amount of information on work-family issues is available on the Internet. Providing employees access to a computer and printer to get the information they need is a low-cost way that employers can support their employees with eldercare responsibilities.

Newsletters and Guidebooks

An effective way to inform a large number of employees about caregiving issues is through newsletters and guidebooks. Caregiving information may be provided in a single article in the company newsletter, focusing an entire issue of the newsletter on caregiving concerns, or borrowing from other publications that are devoted to work and family concerns. Guidebooks have been developed by a number of companies to provide information on caregiving, particularly with respect to eldercare.

The advantages of such guidebooks are that they do not require the time commitment associated with going to a lecture, they provide considerable depth, and they can be saved for rereading when needed. The disadvantages include uneven access to the guidebooks for all caregivers and an inability to address the specific concerns of individual caregivers.

Caregiving Fairs

Some employers have implemented (sometimes in partnership with Cooperative Extension and/or the aging network) caregiving fairs where employees may obtain information from a variety of different agencies and organizations at one time. Employees can informally stop at booths and acquire written information about specific community resources. While a disadvantage of caregiving fairs is their inability to provide much in-depth information on specific caregiver concerns, there are several benefits to such an approach. Specifically, they attract those who might not take part in educational seminars and they minimally interrupt the work schedules of employees.

Resources

Information and Referral and Case Management

Some company-based programs are intended to inform employed caregivers about specific services that are available to them and the persons for whom they care. Programs that serve this function usually operate at two different levels: (a) information and referral and (b) case management.

The provision of information and referral, also known as resource and referral, involves informing employed caregivers about specific services that are available to them and their elders and helping them locate these services. It is a relatively inexpensive option. Generally, the service is performed by an in-house employee assistance program (EAP), or by a private, for-profit organization. In other words, a parallel private system of support has been developed in response to perceived deficiencies in the public system of aging services support.

Another level of more intensive and individualized service is case management. This is a service for employed caregivers who need help in assessing, addressing, and monitoring an elder's multiple needs. To date, some employers have offered it via their internal employee assistance program or, more typically, through an external vendor.

Counseling and Support

Some companies provide assistance to employees who are coping with the difficulties of dependent care. Programs focusing on the psychological and logistical ramifications of caregiving range from professional counseling to peer support.

Professional counseling is generally offered to employees through employee assistance programs (EAPs) either within the company or on a contractual basis or through wellness programs. Employee assistance programs have expanded their focus to include an interest in assisting employees with work-family problems centered on eldercare.

Support groups involve placing employees with similar kinds of dependent-care concerns into groups that in some cases are facilitated by a professional and in others they have been led by peers. Such groups typically provide information to members, as well as emotional support. Holding support group meetings in the workplace enables employees to address their concerns without necessitating an additional time commitment for the worker. Groups may be held after work or during the lunch hour. Separate groups for management and non-management

might be desired to enhance willingness to discuss problems. Groups may be promoted as "informational" to overcome discomfort with the possible "psychological" overtones of a "support group." Administration on Aging staff can be of assistance in organizing and/or convening such groups.

Peer Support is support that one employed caregiver can offer to another. A few companies have attempted to institutionalize this support.

Personal Assistance

Many companies have a human resource professional who is experienced in working with health insurance companies. Although not commonly done, this person could hold workshops at lunchtime or after work, or meet individually with employed caregivers to assist them with health insurance paperwork. Trained volunteers in local agencies can also provide help. Providing access to elder law professionals through workshops or through a listing of such professionals is a great benefit to caregivers.

Direct Services

Adult Day Care

The provision of company-sponsored adult daycare centers for the elderly is just beginning. Some companies help employees to deal with their dependent care needs directly, by providing subsidies, vouchers, or discounts for particular services, such as adult day service and respite programs, or by sponsoring on-site or near-site day-care facilities. AoA contract agencies can make arrangements with employers for employed caregivers to use their adult day or respite services at a discount or through subsidies or vouchers.

Respite Care

In addition to daycare arrangements for their elderly relatives, employees also need respite from full-time caregiving for the times when they are at home. Respite care involves care by a substitute caregiver to assist an elder or adult with disabilities when the employee needs to take a break in evenings or weekends. AoAs can also be of assistance in establishing registries of respite care workers.

Note: Extension educators and staff associated with the aging network can arrange for these topics to be included in educational seminars and identify local resources, volunteer and fee-for-service, with expertise in health insurance and elder law matters.

Benefits

Typically, employee benefits plans have several features. First, they provide protection against the loss of earnings (income maintenance) when regular earnings are lost as a result of death, injury, illness, disability, retirement, or loss of job. Second, they typically cover payment of the medical expenses associated with illness, injury, or other health-care needs. Third, they provide paid released time for vacations, holidays, and personal needs. Finally, certain nonmedical services (e.g., legal, educational, or mental health) may be covered or may be provided as benefits directly to employees.

Although benefits packages vary, the majority include health insurance, life insurance, participation in a pension plan and/or profit sharing, paid holidays, vacations, and sick leave, and short-term disability. Some employees receive additional benefits, such as for dental care, vision care, dependent care, long-term disability, and liability insurance.

There are two basic types of benefits plans. The first type includes those composed of an identical set of benefits for all employees in a given company; this is the "standard" or "traditional" approach to benefits plans. The second type is the "flexible" or "cafeteria" approach, in which employees choose among two or more benefits with respect to all or part of the employer's contributions for employees' benefits.

Flexible Benefits Plans

Flexible or cafeteria benefits plans are designed to permit employees to choose from a "menu" of benefits or cash compensation. Such plans recognize that individual employees' benefits needs differ depending on the employee's age, salary, and family status. A major portion of the costs of the benefits is paid by the employer by establishing a "flexible benefit allowance" of a certain dollar amount. Every employee must choose basic benefits (one exception is when an employee's spouse has medical coverage for the family through his or her employer, so additional medical coverage is not needed). Any remaining benefits dollars can then be used to purchase additional benefits. If the cost of benefits selected by an employee is higher than the allowance, the employee is responsible for that cost, usually through salary reduction (i.e., a portion of their salary before taxes is used to fund the optional benefits of their choice).

For employers, flexible benefits plans have several advantages. First, such plans can improve employee satisfaction with benefits, since they can better meet a variety of employee needs. Second, when optional benefits are funded through salary

reduction (i.e., payroll deduction, before taxes), employers can better manage the costs of benefits because employees can elect lower levels of coverage (e.g., if their spouse has benefits through his or her employer). A third advantage of flexible benefits plans for employers is that benefits of use only to particular groups of employees can be offered without raising questions of inequity, since other employees can choose alternate benefits. Related to this point, it should be noted that federal tax law dictates that all benefits must be available on substantially the same terms to all employees. Fourth, the pressure from employees for new benefits can be accommodated without great additional costs since such benefits can be added as choices to employees without expanding the employer's total contribution for benefits and benefits that are no longer of interest to employees can be easily eliminated as choices. The primary disadvantages to employers of flexible benefits plans can be the complexities of benefit administration and communication and their cost of administration and implementation, although this cost is decreasing with greater experience with such plans.

For employees, flexible benefits plans are advantageous because they allow employees to choose benefits that suit their needs and those of their family. Another advantage to employees is that, because certain expenses are paid using pretax dollars, employees' income taxes can thereby be reduced. A disadvantage is the potential for lack of equity in the use of salary reductions (payroll deductions) to pay for optional benefits. This form of plan is more attractive to employees with higher pay than to those who earn less, who may need all the income earned to meet monthly expenses. Another disadvantage resulting from the use of salary reduction to fund additional benefits is the accompanying reduction in Social Security benefits that will be experienced upon retirement or disability.

Flexible Spending Accounts

Flexible spending accounts, also called benefit reimbursement accounts, are those into which employees can allocate either their own pretax dollars or credits or flexible benefits dollars given to them by their employer to pay for certain expenses not covered under the standard package, such as additional medical expenses; dental, legal, dependent care; or other expenses. Flexible spending accounts may be available to employees as one option of their cafeteria plan. Alternatively, they may be made available by employers independently of the benefits plan as a service to employees.

Of particular relevance here is the dependent-care reimbursement account, also known as a dependent-care assistance plan or program. Dependent-Care Assistance Plans are covered in the section on Government Responses to the Needs of Employed Caregivers.

Long-Term Care Insurance

Another form of an employee benefit is group long-term care insurance (LTCI) for employees, their spouses, and sometimes their parents and parents-in-law, and/or retirees and their spouses. This insurance may be offered as an add-on option to a standard employee benefits package or as an optional benefit among others in a flexible benefits plan. Long-term care is a set of health, personal care, and social services delivered over a sustained period of time to persons who have lost or never acquired some degree of functional capacity. Thus it refers to care needed persons of any age who have physical or mental limitations.

The average private pay cost of a nursing home stay in 2012 was about \$88,000 per year and exceeded \$100,000 in 10 states. The base rate for assisted living facilities averaged \$41,000 per year in 2012, and adult day services averaged \$66 per day. During the same period, hourly home care agency rates averaged \$20 per day for a licensed non-Medicare certified home health aide.

The market for private long-term care insurance (LTCI) developed as an alternative to public program coverage or direct payments for services. Products range from standard LTCI to products that link LTCI with an annuity or life insurance. Despite the availability of LTCI since the late 1970s and increased sales in the 1990s, its overall role is still limited. Private LTCI currently pays for less than 12 percent of all long-term care costs. However, for those who own private LTCI and are receiving paid care, one study finds that these benefits pay for 60 to 75 percent of care at any given time.

In 2012, the AARP Public Policy Institute published a Long-Term Care Insurance Update Fact Sheet that may be useful. http://www.aarp.org/content/dam/aarp/research/public_policy_institute/ltc/2012/ltc-insurance-2012-update-AARP-ppi-ltc.pdf

From an employees' standpoint, the advantages of employer-sponsored long-term care insurance are the reduced cost, due to group rates, and the convenience of having premiums deducted directly from their paychecks. The disadvantages are the relative newness of the products (thus a lack of history and experience with them), the exclusion in some policies of preexisting conditions, and the cost of premiums, even at group rates.

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Appendix

SECTION OUTLINE

- Handouts That Can be Shared with Employers
- An Overview of Eldercare and Work
- Key Publications
- Additional Publications
(Reports, Handbooks, Planning Guides, and Workbooks)
- Journal Articles
- Books and Book Chapters
- Fact Sheets
- News Releases
- Web Resources
- Curricula for Caregivers

Resources Available on the “Balancing Work and Eldercare” Website

Additional resources that educators may find helpful have been compiled and made available on a UW-Extension website: “Balancing Work and Family Care of Older Persons” <http://fyi.uwex.edu/balancingcare/>

An outline of these resources appears below.

Handouts That Can Be Shared With Employers

- ◆ Why is This Topic Important?
- ◆ What are the Primary Needs of Working Caregivers?
- ◆ The Employed Family Caregiver Survey
- ◆ Detailed Instructions for Survey Coordinators (i.e. educators partnering with employers to register for the Survey and compile the results)
- ◆ Follow-up Interview with a Representative of the Employer When Survey Results are Shared (See page 26-29)
- ◆ Conducting a One-year Follow-up Interview (See page 30-31)

An Overview of Eldercare and Work

Key Publications

- ◆ *Fact Sheet: Understanding the Impact of Family Caregiving on Work*. AARP Public Policy Institute; co-authored by Lynn Feinberg and Rita Choula. October 2012.
- ◆ *National Study of Employers*. Families and Work Institute and the Society for Human Resource Management (SHRM); authored by Kenneth Matos and Ellen Galinsky. 2012.
- ◆ *Best Practices in Workplace Eldercare*. National Alliance for Caregiving and ReACT (Respect a Caregiver’s Time). March 2012.
- ◆ *Caregiving: Workplace Support Checklist*. Heath Advocate. 2010.
- ◆ *The MetLife Study of Working Caregivers and Employer Health Care Costs*. Mature Market Institute (MMI), Metropolitan Life Insurance Company, and the National Alliance for Caregiving (NAC). 2010, February.
- ◆ *Corporate Eldercare Programs: Their Impact, Effectiveness, and Implications for Employers*. LifeCare, Inc: Shelton, CT. 2008.
- ◆ *The MetLife Caregiving Cost Study: Productivity Losses to U.S. Business*. MetLife Mature Market Institute & National Alliance for Caregiving. New York, NY: Metropolitan Life Insurance Company. 2006.
- ◆ *When employees become caregivers: A manager’s workbook*. 2004. Center for Medicare and Medicaid Services. Publication CMS-11035. Baltimore, MD.

Additional Publications
(Reports, Handbooks, Planning Guides, and Workbooks)

Journal Articles

Books and Book Chapters

Fact Sheets

News Releases

Web Resources

Curricula for Caregivers



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What Every Employer Needs to Know: Helping Employers Balance Work and Eldercare