


A large green rectangular block is positioned in the top left corner. At its bottom right corner, there is a small yellow square. A thin grey line extends horizontally from the right side of this yellow square towards the center of the page.

AARP Oregon Caregiving in the Workplace Survey

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August 2004



AARP Oregon Caregiving in the Workplace Survey

Report Prepared by Erica Dinger

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Acknowledgements

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Background

As parents and loved ones age, many employees find themselves in the role of caregiver to their aging family members. This caregiving role may interfere with their role as employee through absenteeism, early departure from work, late arrival to work, personal phone calls, and emotional distraction. The costs associated with this loss of productivity and with employee attrition are high; overall costs of caregiving to U.S. companies has been estimated at 11.4 billion dollars annually—or \$1,142 per employee per year.¹ The total cost of unpaid caregiving is estimated to be \$257 billion dollars annually.²

In order to assess what resources are available in Oregon to employees who are caring for an older relative, AARP Oregon commissioned this study of companies in the State who have at least two employees. 2,223 businesses were contacted through a mail survey directed to their human resources department, and 572 (26%) responded. This survey has a sampling error of plus or minus 3.5 percent.

Highlights

- Almost half (45%) of respondents say that their employees had provided care or assistance to an older person in the last two years.
- Almost four in ten (39%) say that an employee has asked for time off for caregiving, while 16 percent say an employee has requested time off under the Family Medical Leave Act.
- Flexible work schedules (48%), funeral or bereavement leave (44%), and job security (41%) are the most common services or programs offered to caregivers. However, 27 percent say they offer no programs or services for caregivers.
- Cost issues (21%) are the biggest barrier to implementing caregiving programs or services.
- Over half (52%) say that caregiving has a major or minor effect on employee performance.
- Six in ten (59%) would be interested in learning more about resources available for caregiving employees.

¹ *The Metlife Study of Employer Costs for Working Caregivers*, 1997. Metlife Mature Market Group, Westport, CT.

² *Caregiving in the U.S.*, 2004, National Alliance for Caregiving and AARP, funded by Metlife Foundation, Washington, D.C.

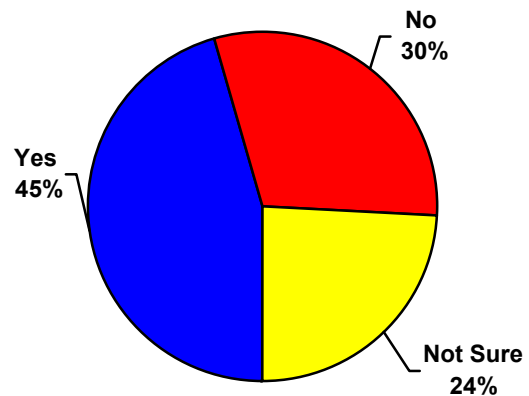
Findings

Employers believe their employees have provided caregiving services in the last two years.

Almost half of employers say that they have an employee who has provided care or assistance to someone over 18 years of age who is ill, physically or mentally disabled, or elderly in the last two years.

Those respondents who said they had an employee who was a caregiver (n=259) were asked to estimate what percentage of their employees were caregivers: 60 percent said 0-5 percent were caregivers, 17 percent said 6-10 percent, and 14 percent said 11 percent or more. Eight percent were unsure of how many of their employees were caregivers.

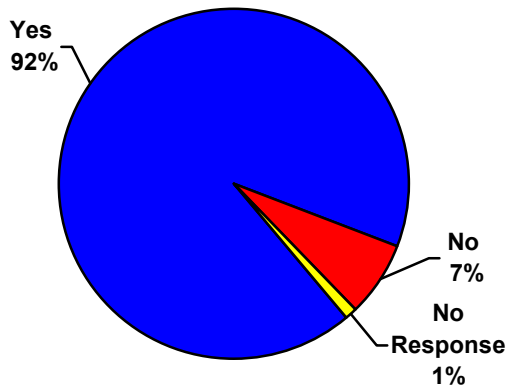
Whether Employees are Caregivers
(N=572)



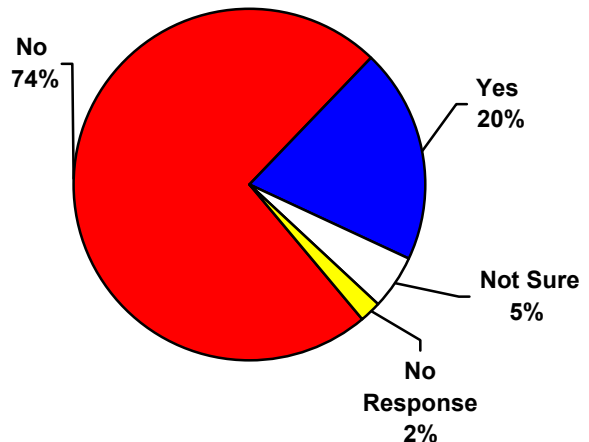
Nearly all companies offer benefits but the majority do not offer an employee assistance program.

Over nine in ten Oregon companies say they offer benefits to their employees, such as health insurance or paid time off. However, only 20 percent provide an Employee Assistance Program (EAP). An EAP typically provides confidential short-term counseling to employees having difficulties in their personal and/or work life, as well as offering referral services.

Whether Employers Offer Employee Benefits
(N=572)



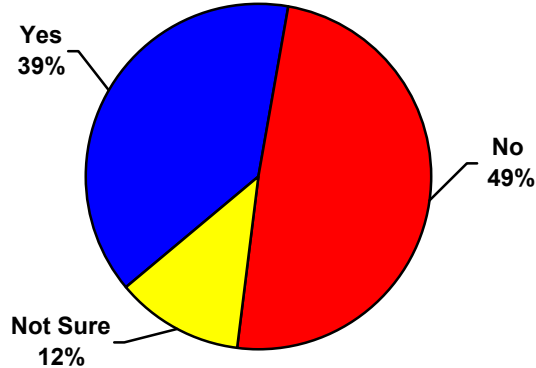
Whether Companies Have an EPA
(N=572)



Employers believe their employees would be comfortable asking for time off for caregiving, and almost four in ten say that employees have done so.

Eight in ten (79%) employers believe that their employees would be comfortable asking for time off for caregiving duties. Almost four in ten (39%) report that employees have asked for time off to assist someone 18 years or older who is ill, disabled, or elderly. However, only sixteen percent say that employees have requested time off under the Family Medical Leave Act.

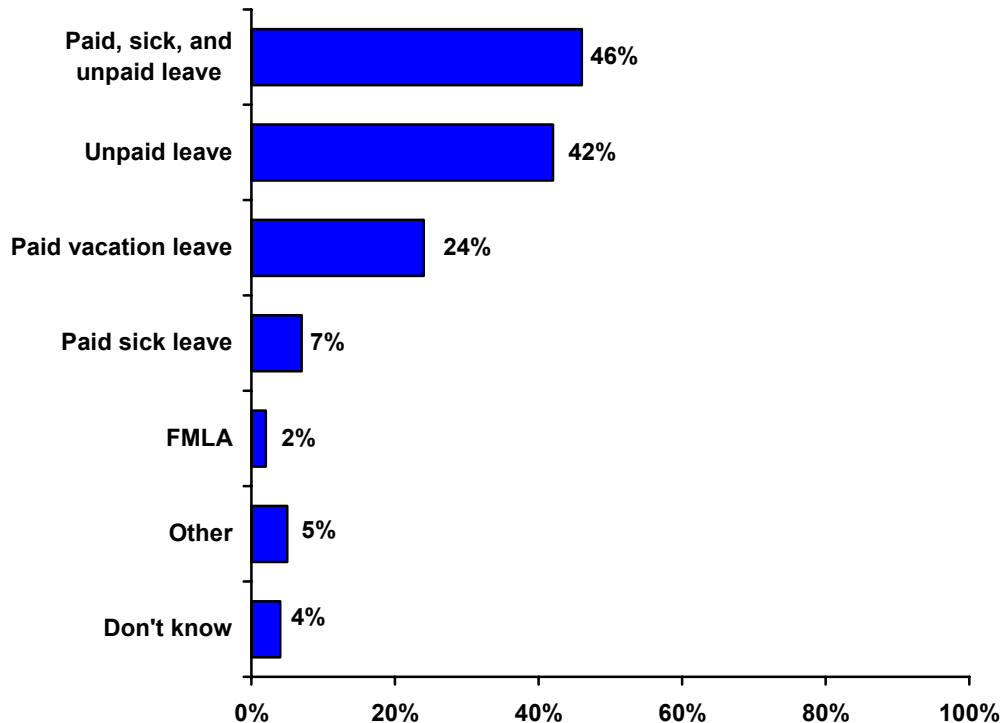
Whether Employees Have Asked for Time Off for Caregiving (N=572)



Oregon employees typically use vacation, sick, and unpaid leave if they need time off for caregiving activities.

Almost half of respondents said that if an employee took time off to take care of someone 18 years or older who is ill, disabled, or elderly they would use their paid vacation time, sick leave, and unpaid leave to do so. More than four in ten said an employee would take unpaid leave.

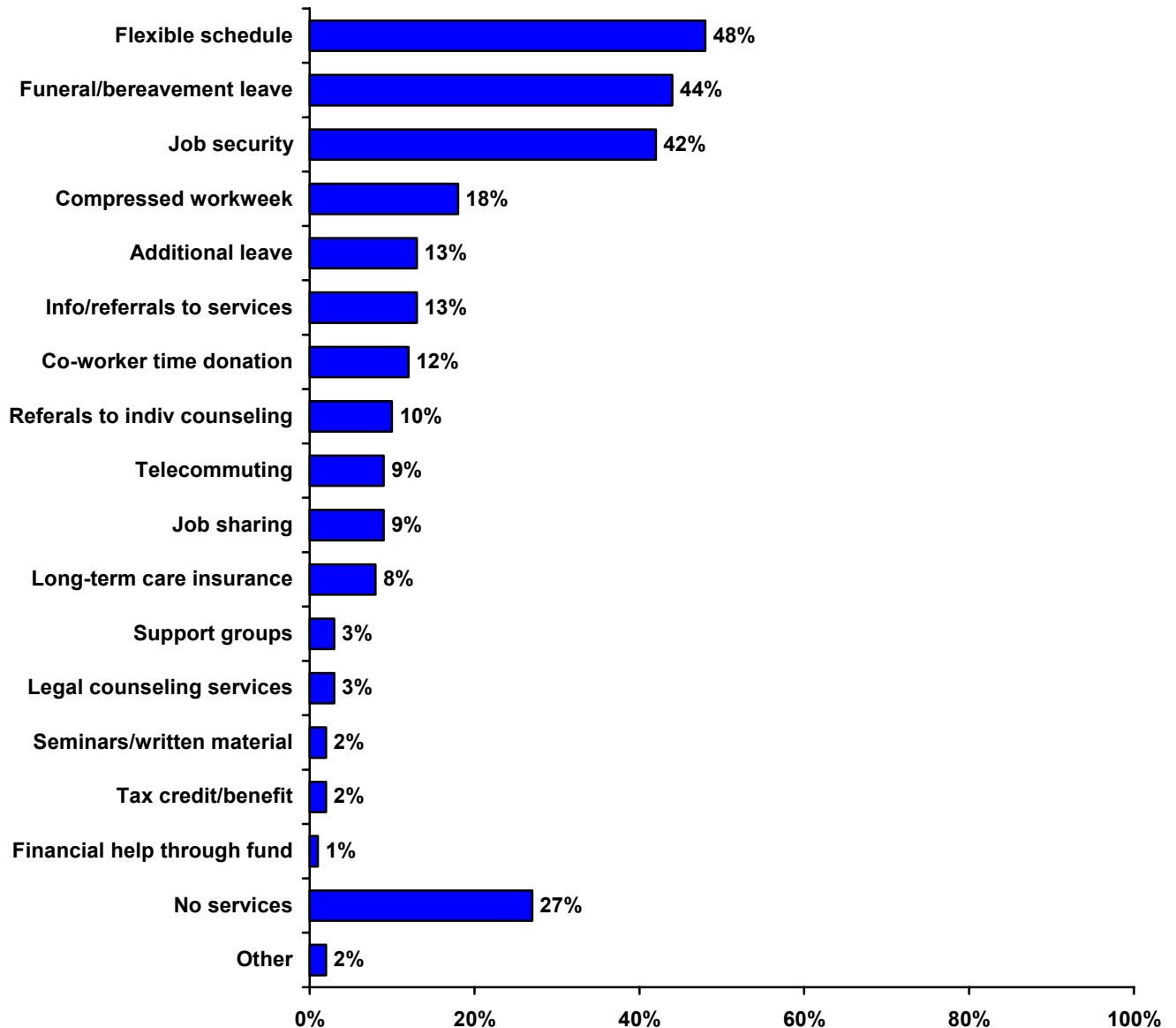
Type of Leave Employees Would Use if They Took Time Off to Take Care of an Older Relative (N=572)



Almost half of companies offer a flexible schedule for caregiving employees.

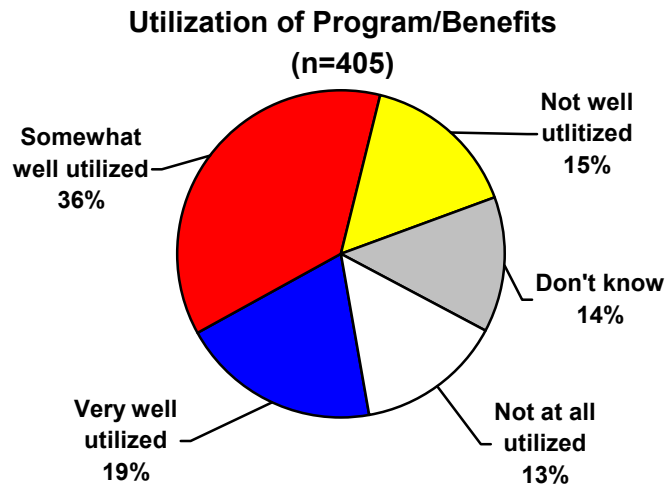
Flexible work schedules, funeral/bereavement leave, and job security are the most commonly offered benefits for caregiving employees among companies in Oregon. Some companies also offer more creative benefits, such as support groups, special funds, and allowing other employees to donate time to the caregiving employee. However, fully 27 percent offer no services to caregiving employees.

**Percent of Companies Who Offer Specific Benefits to Caregiving Employees
(N=572)**

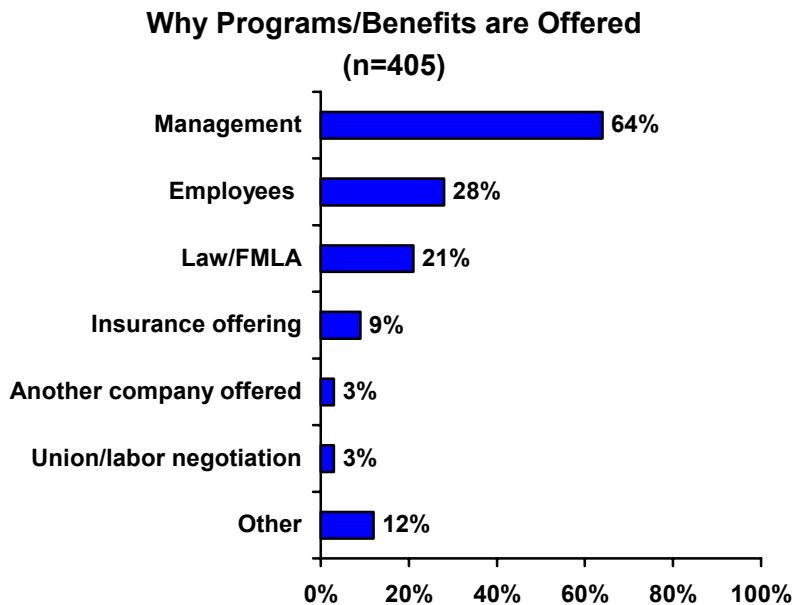


Most caregiving programs have been in place for five or more years and are well utilized.

Six in ten (59%) companies that have a program or benefit for caregivers (n=405) say that the program or benefit has been in place for five years or more. Two in ten (19%) say the program has been in place for two to five years. In addition, over half (55%) say the program or benefit is *very* or *somewhat well utilized*.



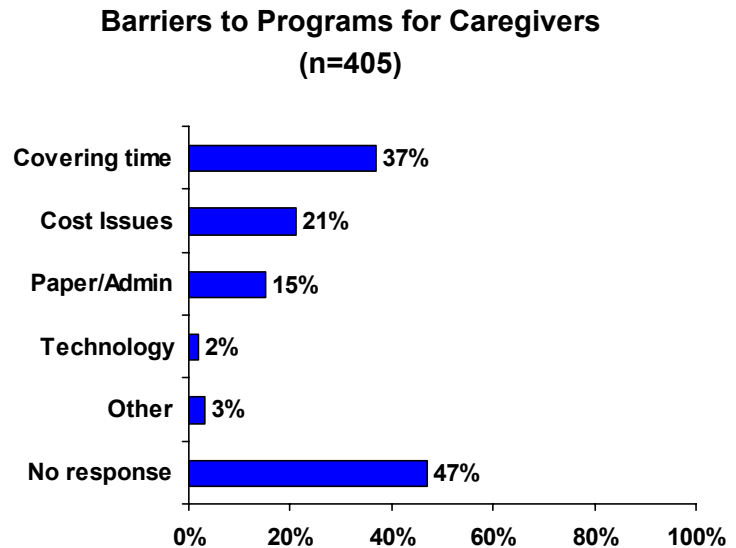
Programs and benefits are offered because management saw a need for them.



Two-thirds of respondents who offer them say that programs and benefits are offered to caregivers because management saw a need for them. Almost three in ten say that employees asked for such programs, while two in ten say they were mandated by the law or by the Family Medical Leave Act.

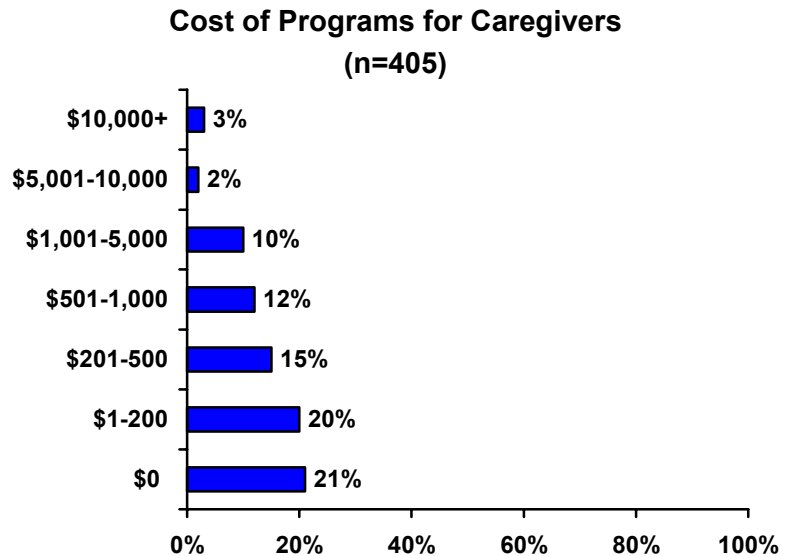
Covering the caregiving employee's time is the main barrier to programs for caregivers.

Almost four in ten employers who offer any benefits or programs say that covering the caregiving employee's time away from work is the main barrier to programs for caregivers. Two in ten employers say that cost is a barrier to getting programs and benefits for caregivers implemented. One in seven is concerned with the increased paperwork or administrative issues of such programs.



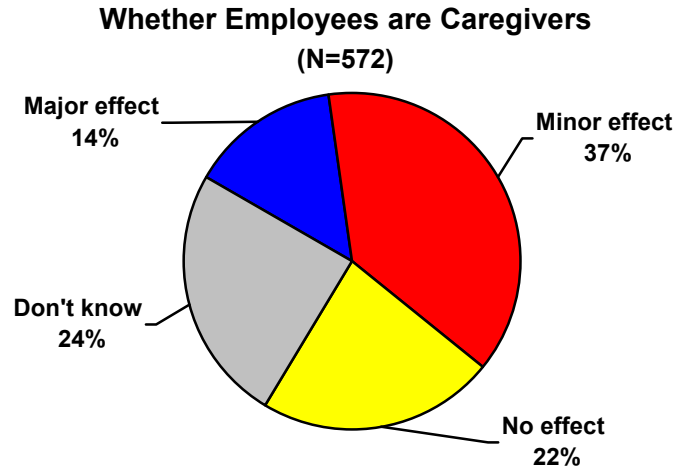
The cost of programs for caregivers varies.

Employers with programs give widely different responses to how much money it costs per year to provide the programs or benefits for caregivers. The cost per person for these benefits is not affected by the size of the company or whether it is non-profit, for-profit, or a government agency. Rather, the cost is determined by the types of programs or benefits offered by the company and their choice of provider.



Employers recognize that caregiving affects employee performance.

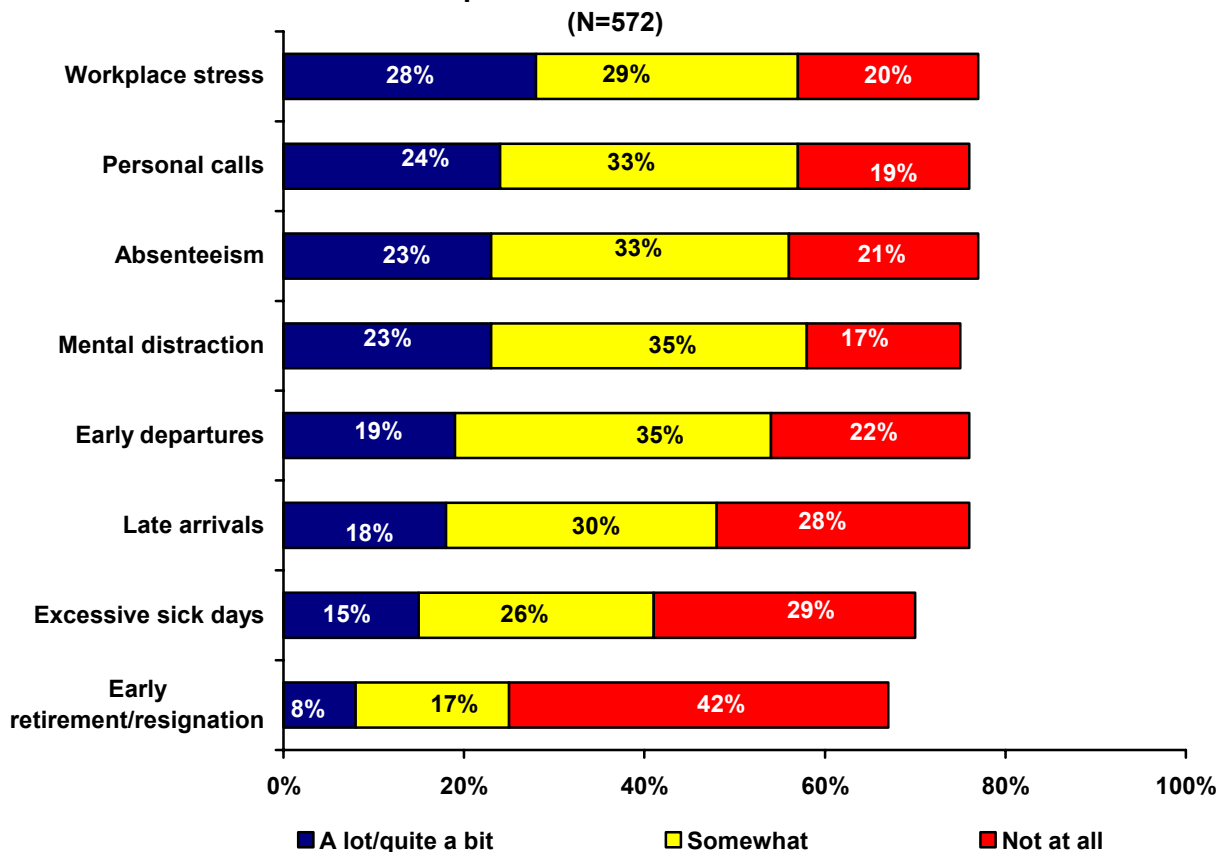
Employers were asked how much providing caregiving to someone 18 years or older who is ill, disabled, or elderly affects employee performance. One in seven said it had a major effect, while 37 percent said it had a minor effect. A quarter said they did not know how much caregiving effected employee performance.



Employers are aware that caregiving responsibilities influence employee performance factors.

Employers show awareness of how caregiving responsibilities can influence performance factors such as early departures from work, absenteeism, and mental or emotional distraction. However, it should be noted that about two in ten respondents were either not sure or gave no response to each of the factors listed (see Annotated Questionnaire).

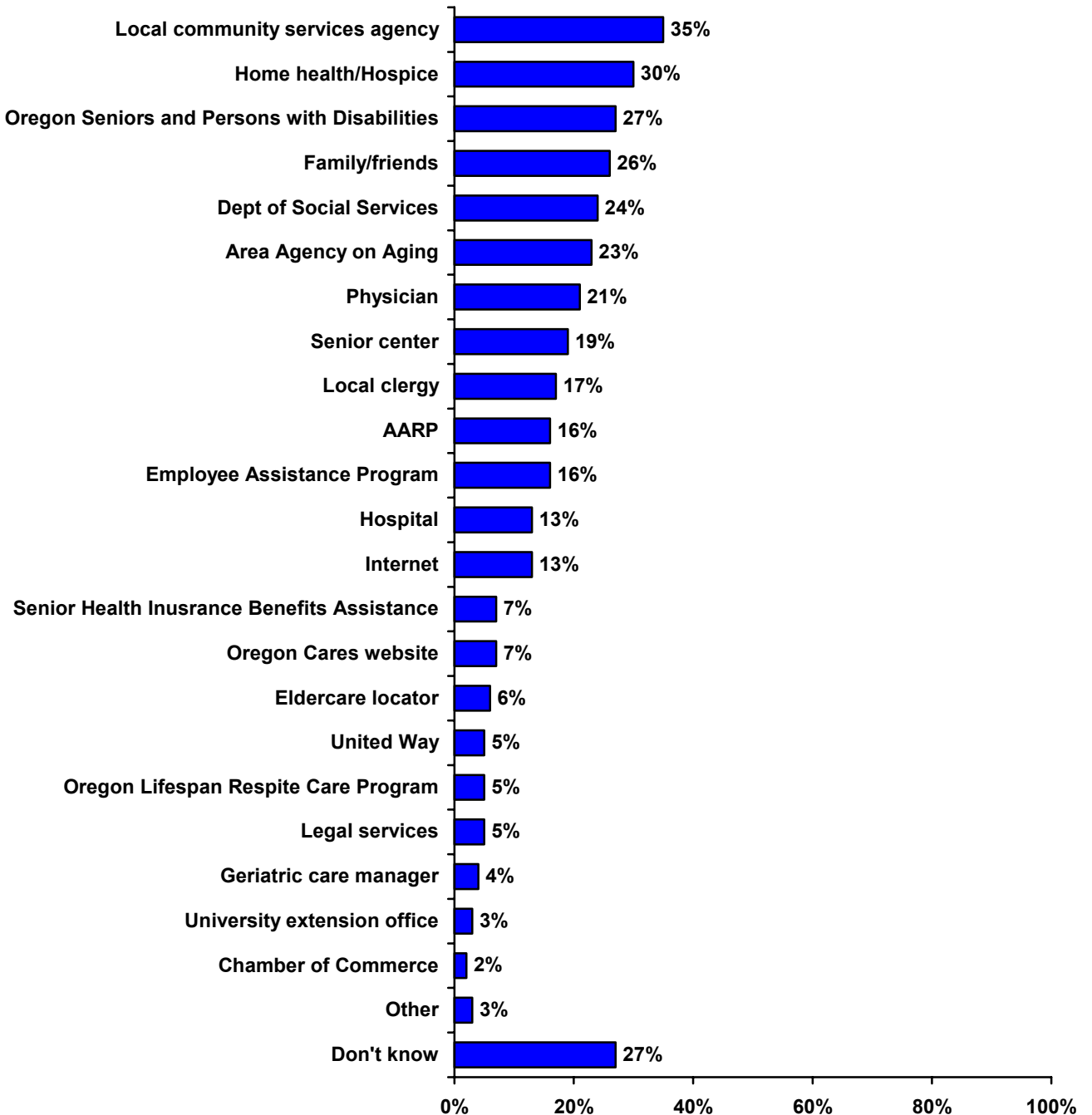
Extent That Employers Think Elder Care Responsibilities Influence Workplace Performance Factors



Employers would refer employees to the local community services agency or home health care and hospice for help with caregiving issues.

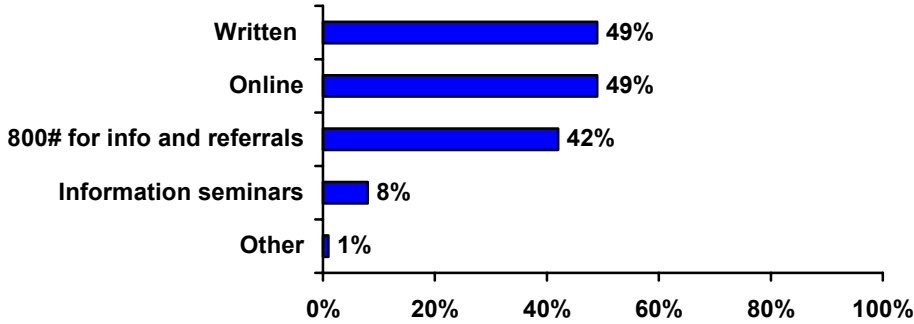
Employers say they are most likely to refer employees with caregiving needs to the local community services agency or to a home health care agency. About a quarter would refer employees to the Oregon Seniors and Persons with Disabilities Office, family and friends, or the Department of Social Services. One in six would refer employees to AARP.

**Where Employers Refer Employees with Caregiving Issues
(N=572)**



Employers want information on caregiving and would prefer that information to be written.

Percent of Employers Interested in Resources That Rate Resource Type as Useful (N=572)

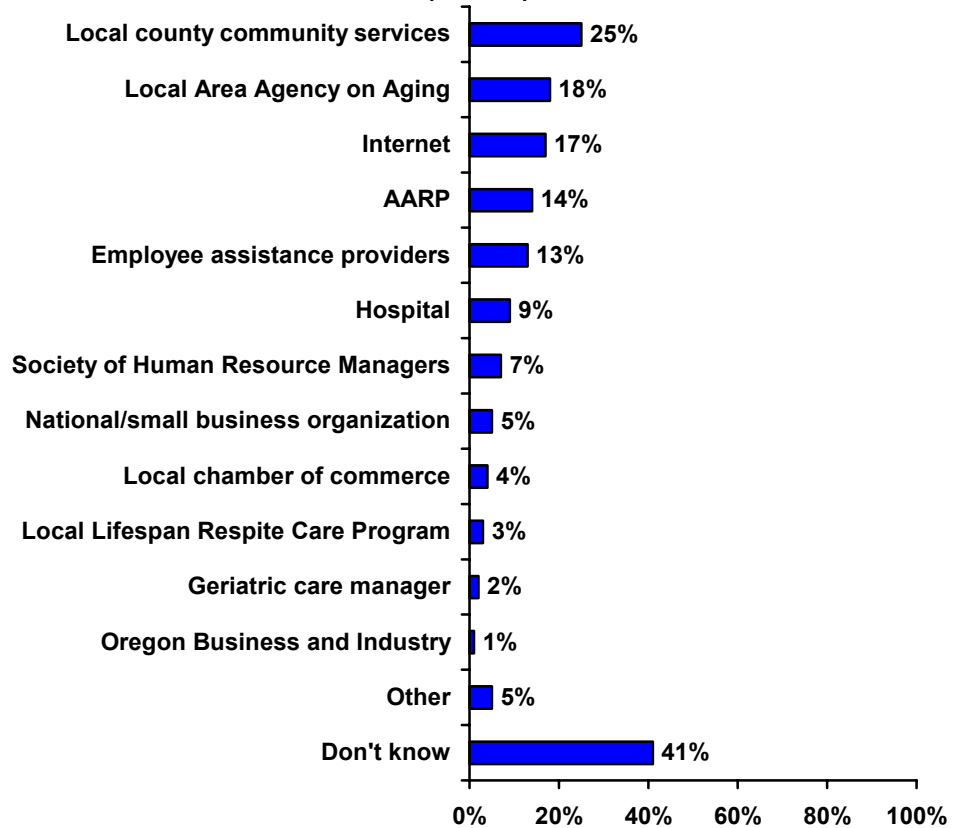


Six in ten (59%) employers want information on low- or no-cost resources available for caregivers. When asked how they would like to receive such information, almost half say they would like it to be written or available online.

Employers say they would look to the local county community services agency for help in developing an eldercare program.

A quarter of employers say that they would go to the local county community services agency for help in developing programs to aid caregivers. Others say they would turn to the local Area Agency on Aging and Disabilities or the internet for help. However, more than four in ten say they don't know who they would turn to for help.

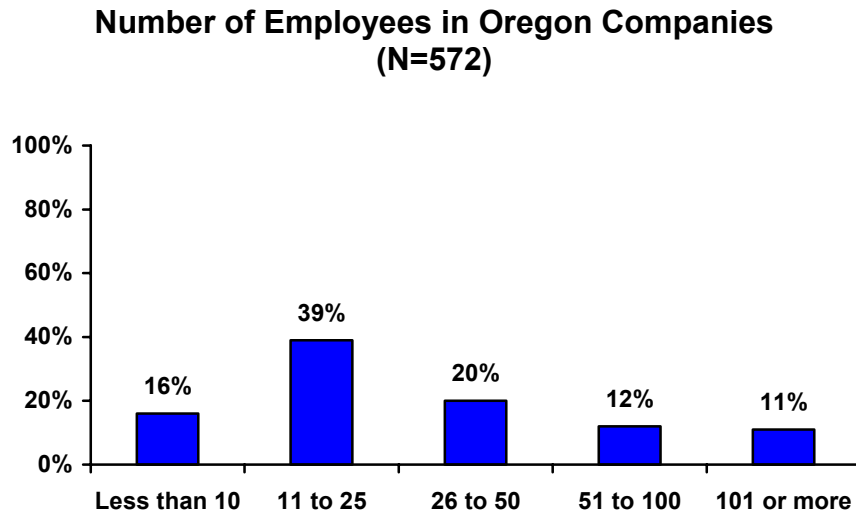
Percent of Employers Interested in Resources That Rate Resource Type as Useful (N=572)



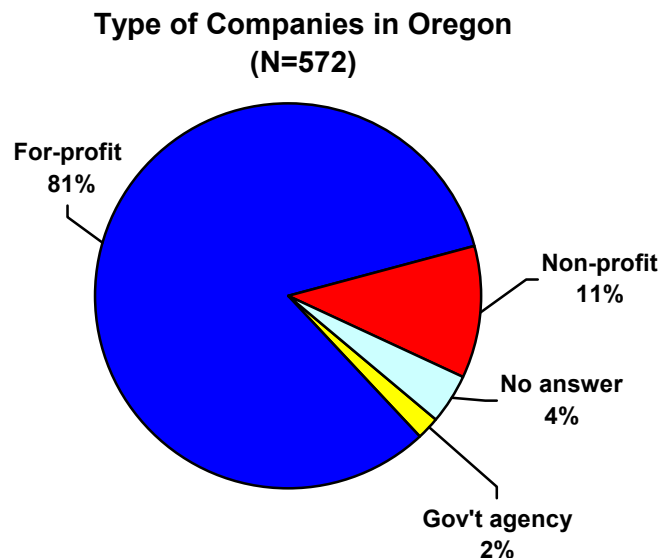
Company Characteristics

Most Oregon companies that responded have between 11 and 50 employees and are for-profit businesses.

The majority (59%) of Oregon companies that responded have between 11 and 50 employees.



Eight in ten (81%) of the responding companies are for-profit companies, while 11 percent are non-profits and two percent are government agencies. Most companies are not part of a larger company (82%). Moreover, nearly all companies in the state (86%) say benefit decisions are made locally and not somewhere else.



Conclusions

Employers in Oregon are aware that their employees are engaged in caregiving activities for family members and loved ones. In addition, employers recognize that caregiving activities affect their employees' work performance, including things like workplace stress, personal calls, and absenteeism.

Nearly all employers offer some employee benefits, and many offer flexible work schedules, funeral or bereavement leave, and job security to aid those employees who are also caregiving. However, employers recognize that more could be done and want information on no- or low-cost resources for caregiving employees.

AARP Oregon has the opportunity to take part in educating employers on the issues of caregiving in the workplace. When an employee needs information about caregiving, employers need to know that AARP is a good source of information. AARP Oregon is in a position to help employers across Oregon develop programs for employees who are facing the difficult task of balancing their duties as employees with their duties as caregivers.

Methodology

Survey Sampling, Inc. provided a sample of employers with more than one employee for the state of Oregon. A pre-notification letter was then sent to the human resources department of 2,223 businesses in the state of Oregon with more than one employee. This was followed by the survey itself, a reminder postcard, and a second copy of the survey. 572 (26%) of the businesses contacted responded to the survey. This survey has a sampling error of plus or minus 3.5 percent.

ANNOTATED QUESTIONNAIRE

2004 Oregon Employers and Eldercare Survey

(Sample =572; Response Rate=26%; Margin of Error +/-3.5%)

DIRECTIONS: For each survey item below, write in your answer or check the box that best represents your answer.

1. How many people work either full or part time in your company in the state of Oregon?

<u>%</u>	
16	Less than 10
39	11-25
20	26-50
12	51-100
11	101 or more
1	Don't know
1	No Answer

2. Are any of your employees offered any benefits (i.e. health and life insurance, holiday leave, vacation/sick leave, etc.)?

<u>%</u>	
92	Yes
7	No
1	Don't know
1	No Answer

A caregiver can be anyone who provides unpaid help to a relative or friend 18 years or older who is ill, physically or mentally disabled, or elderly. This kind of help includes assistance with bathing, dressing, preparing meals, taking medications, doing household chores, taking care of finances, arranging for outside services, or regularly visiting the person needing care. The relative or friend you are helping may be someone who lives with you or somewhere else.

3. In the past two years, have any of your employees provided care or assistance to someone 18 years or older who is ill, disabled, or elderly (including a spouse, parent, other relative, or friend)?

<u>%</u>	
45	Yes
30	No [SKIP TO Q5]
24	Don't know [SKIP TO Q5]
1	No Answer

4. Approximately what percentage of your employees do you think are providing care or assistance to someone 18 years or older who is ill, disabled, or elderly? (n=259)

<u>%</u>		<u>%</u>	
60	0-5%	<.5	50-69%
17	6-10%	2	70% or more
4	20-29%	8	Not sure
2	30-39%	2	No Answer
1	40-49%		

5. **Have any of your employees asked for time off to assist someone 18 years or older who is ill, disabled, or elderly?**

<u>%</u>	
39	Yes
49	No
12	No Answer

6. **Have any of your employees requested time off under the Family Medical Leave Act to assist someone 18 years or older who is ill, disabled, or elderly?**

<u>%</u>	
16	Yes
76	No
8	No Answer

7. **Do you believe your employees would be *comfortable* asking for time off to take care of or assist someone 18 years or older who is ill, disabled, or elderly?**

<u>%</u>	
79	Yes
5	No
16	No Answer

8. **If an employee took time off to take care of or assist someone, what kind of leave would they use? Would they use.... [Check all that apply]**

<u>%</u>	
24	Paid vacation leave
7	Paid sick leave
42	Unpaid leave
46	All of the above (vacation, sick, and unpaid leave)
6	Other (Please Specify _____)
4	Don't know
1	No Answer

9. **Does your company have an Employee Assistance Program (EAP)? EAPs provide employees with work-life consultation and referral, often assisting employees with a variety of personal, family, and work issues.**

<u>%</u>	
20	Yes
74	No
5	Not sure
2	No Answer

10. Does your company offer any of the following services or programs for employees who are caring for someone 18 years or older who is ill, disabled, or elderly?

<u>%</u>	<u>(CHECK ALL THAT APPLY)</u>
1	Financial help through a special fund that employees contribute to voluntarily
13	Additional personal leave to be used for caregiving
12	Allow employees the opportunity to donate their sick time to another employee who is caring for a relative
48	Flexible work schedule to accommodate time needed to provide caregiving
3	Support groups
13	Information and referral assistance to help find care providers and resources
41	Job security for employee who need to take time off to provide caregiving
9	Telecommuting or allowing employees to work from home
9	Job sharing
2	Information about caregiver through seminars or written materials
10	Referrals to individual counseling
18	Compressed workweek that allows employees to work longer hours but fewer days
44	Funeral/bereavement leave
-	Subsidized care or care vouchers
3	Legal counseling services (i.e., estate planning)
2	Tax credit/benefit
8	Long-term care insurance
2	Other (Please specify): _____
27	No services are offered [SKIP TO Q16]
2	No Answer

11. On average, how well would you say the above program(s)/benefit(s) that are offered to caregivers are utilized? (n=405)

<u>%</u>	
19	Very well utilized
36	Somewhat utilized
15	Not well utilized
13	Not at all utilized
14	Don't know
3	No Answer

12. On average, how long has the above program(s)/benefit(s) been in place? (n=405)

<u>%</u>	
1	Less than 6 months
3	Between 6-12 months
6	Between 1-2 years
19	Between 2-5 years
59	5 years or more
9	Don't know
3	No Answer

13. What were the circumstances that led to the above programs(s)/benefit(s) being offered?

<u>%</u>	<i>(CHECK ALL THAT APPLY)</i>	(n=405)
28	Employees asked for it	
64	Management saw a need	
3	Another company implemented program successfully	
9	Insurance offering	
3	Union/labor negotiation	
21	Law/FMLA	
12	Other:	
7	No Answer	

14. Were there any barriers to getting the program(s)/benefit(s) mentioned in question 10 implemented? (n=405)

<u>%</u>	<i>(CHECK ALL THAT APPLY)</i>
21	Cost issues
15	Increased paperwork/administrative issues
37	Covering the employee's time
2	Technology issues
3	Other: (Please Specify _____)
3	None
47	No Answer

15. About how much do you think it costs a year to provide the programs/benefits listed in Question 10 per employee? (n=405)

<u>%</u>	
21	\$0
20	\$1-200
15	\$201-500
12	\$501-1,000
10	\$1,001-5,000
2	\$5,001-10,000
3	\$10,001 plus
16	No Answer

16. To what extent do you think caregiving responsibilities influence the following performance factors in your company?

	A lot	Quite a bit	Somewhat	Not at all	Not Sure
a. Workplace stress	10%	18%	29%	20%	18%
b. Absenteeism	7	16	33	21	17
c. Late arrivals to work	5	14	30	28	17
d. Early departures from work	4	15	35	22	17
e. Mental/emotional distraction	7	15	35	17	19
f. The amount of personal calls made at work	8	16	33	19	18
g. Excessive sick days/call-offs	5	10	26	29	23
h. Early retirement/resignation/ official reduction in hours	3	5	17	42	26

17. How much do you think providing care or assistance to an ill, disabled, or elderly person affects employee performance in your company or business?

<u>%</u>	
14	Major effect
37	Minor effect
22	No effect
24	Don't know
4	No Answer

18. If an employee was having difficulty caring for an ill, disabled, or elderly person and came to you for assistance, where would you refer the employee for help?

(CHECK ALL THAT APPLY)

<u>%</u>	
27	Oregon Seniors and Persons with Disabilities
7	Senior Health Insurance Benefits Assistance Program (SHIBA)
7	Oregon Cares State web site
5	Local Oregon Lifespan Respite Care Program
16	AARP
35	Local community services agency
23	Local Area Agency on Aging and Disabilities
3	Oregon State University Extension Office
26	Family/friends
17	Local clergy
21	Physician
19	Senior center
2	Chamber of Commerce
30	Home health/Hospice agency
13	Hospital
24	Local Department of Social Services
4	Geriatric Care Manager
5	Legal services
6	Eldercare Locator (national toll free information and referral line)
5	United Way
13	Internet
16	Employee Assistance Program/Eldercare Work/Life benefits
4	Other: _____
27	Don't know
2	No Answer

19. If there were low- or no-cost resources available for employees caring for persons 18 years and older who are ill, disabled, or elderly, would you be interested in having or knowing about these resources?

<u>%</u>	
59	Yes
14	No
23	Don't know
4	No Answer

20. What kind of resources do you think would be useful?

<u>%</u>	
49	Written information
49	On-line information
8	Information seminars
42	An 800 number for information and referrals
1	Other: _____
11	Don't know
7	No Answer

21. If you wanted to establish a care program that provided assistance to those caring for an adult spouse, parent, relative, or friend at your company, where would you go for assistance?

<u>%</u>	
25	Local county community service agency
14	AARP
18	Local Area Agency on Aging and Disabilities
4	Local Chamber of Commerce
2	Geriatric Care Managers
13	Employee Assistance Providers
7	Society of Human Resource Managers (SHRM)
3	Local Lifespan Respite Care Program
9	Hospital
1	Oregon Business and Industry (NCBI)
17	Internet
4	Small business association
1	National business education organization
5	Other: _____
41	Don't know
7	No Answer

Demographic Information

The following questions are for classification purposes only.

22. What best describes your company?

<u>%</u>	
2	Non-profit-Healthcare
9	Non-profit other: _____
8	For-profit-Healthcare
15	For-profit-Manufacturing
58	For-profit other: _____
2	Government agency
2	Other
4	No answer

23. Are you part of a larger company or organization?

<u>%</u>	
14	Yes
82	No [SKIP TO Q25]
1	Don't know [SKIP TO Q25]
4	No Answer

24. Approximately how many employees does your company or organization have nationwide? (n=77) _____

<u>%</u>	
4	Less than 50
10	50-100
21	101-500
20	501-5000
5	5001-more
40	No Answer

25. Are employee benefit decisions made locally, at your location, or are they made somewhere else, such as company headquarters?

<u>%</u>	
86	On location
7	Somewhere else
2	Don't know
6	No Answer

26. Approximately what percentage of your employees in Oregon are female?

<u>%</u>		<u>%</u>	
23	0-10%	11	41-50%
10	11-20%	8	51-60%
7	21-30%	10	61-70%
7	31-40%	17	71% or more
		8	No Answer

27. Approximately what percentage of your employees in Oregon are ethnic or racial minorities?

<u>%</u>		<u>%</u>	
60	0-10%	4	41-50%
14	11-20%	2	51-60%
6	21-30%	1	61-70%
4	31-40%	3	71% or more
		7	No Answer

28. What would you say the average age for employees is at your company?

<u>%</u>	
10	18-29
62	30-45
20	45-55
1	55+
8	No Answer

29. Approximately what percentage of your employees in Oregon work less than 20 hours a week?

<u>%</u>		<u>%</u>	
71	0-10%	4	41-50%
9	11-20%	3	51-60%
5	21-30%	1	61-70%
4	31-40%	2	71% or more
		2	No Answer

30. What area of Oregon is your company located in?

<u>%</u>	
40	Portland Metro (Oregon City, Hillsboro, Beaverton, Gresham)
7	Oregon Coast
31	Willamette Valley
13	Southern Oregon
9	Central Oregon/Cascades
5	Eastern Oregon
2	No Answer

31. Describe your job title.

<u>%</u>	
23	Director of Human Resources
9	Human Resources Staff Member
1	Director/Staff of Employee Assistance Program
6	Other: _____
15	Office Manager
12	Owner
6	President /CEO
5	Financial Manager/Comptroller/Controller
9	Manager
2	Administrator
2	Executive Assistant/Administrative Assistant
2	No Answer

Thank you for completing this survey. Please use the postage-paid envelope and return it to State Member Research, AARP, 601 E Street, NW, Washington, DC 20049, by **July 1, 2004**.

AARP

Knowledge Management

For more information contact Erica Dinger (202) 434-6176