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AARP Ohio Caregiving in the Workplace Survey

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December 2003



AARP Ohio Caregiving in the Workplace Survey

Report Prepared by Erica Dinger

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AARP is a nonprofit, nonpartisan membership organization dedicated to making life better for people 50 and over. We provide information and resources; engage in legislative, regulatory and legal advocacy; assist members in serving their communities; and offer a wide range of unique benefits, special products, and services for our members. These include *AARP The Magazine*, published bimonthly; *AARP Bulletin*, our monthly newspaper; *AARP Segunda Juventud*, our quarterly newspaper in Spanish; *NRTA Live and Learn*, our quarterly newsletter for 50+ educators; and our Web site, www.aarp.org. We have staffed offices in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands.

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 year¹.

In order to assess what resources are available in Ohio to employees who are caring for an older relative, AARP Ohio commissioned this study of companies in the State who have at least two employees. 2,000 businesses were contacted through a mail survey directed to their human resources department, and 639 (32%) responded. This survey has a sampling error of plus or minus 3.2 percent.

Highlights

- More than half (55%) of respondents said that their employees had provided care or assistance to an older person.
- Almost four in ten (39%) say that an employee has asked for time off for caregiving, while 14 percent say an employee has requested time off under the Family Medical Leave Act.
- Funeral or bereavement leave (57%), flexible work schedules (35%), and job security (34%) are the most common services or programs offered to caregivers. However, 29 percent say they offer no programs or services for caregivers.
- Covering the employee's time (45%) is the biggest barrier to implementing caregiving programs or services.
- Over half (55%) say that caregiving has a major or minor effect on employee performance.
- Six in ten (63%) 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.

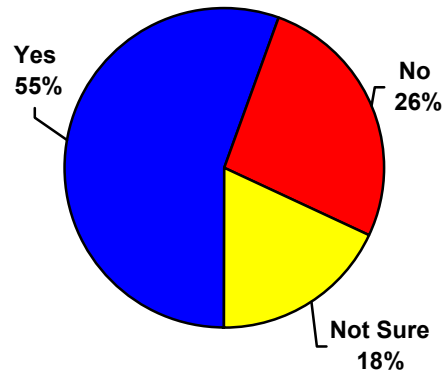
Findings

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

More than half of employers say that they have an employee who has provided care or assistance to an older person during the last two years.

Those respondents who said they had an employee who was a caregiver (n=352) were then asked to estimate what percentage of their employees were caregivers: 50 percent said 0-5 percent were caregivers, 17 percent said 6-10 percent, and 20 percent said 11 percent or more. Twelve percent were unsure of how many of their employees were caregivers.

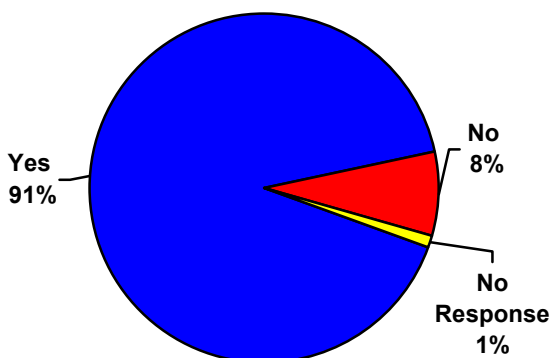
Whether Employees are Caregivers
(N=639)



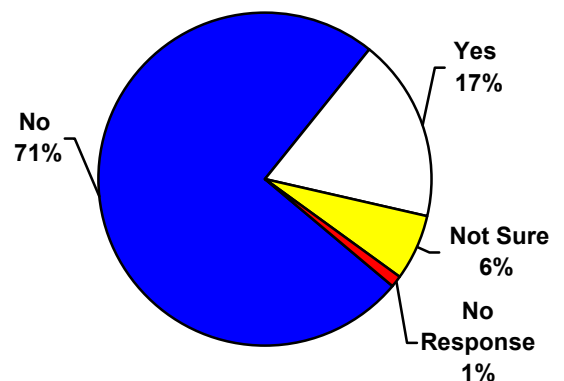
Nearly all companies offer benefits but the majority do not offer an employee assistance program.

Over nine in ten Ohio companies say they offer benefits to their employees, such as health insurance or paid time off. However, only 17 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=639)



Whether Companies Have an EAP
(N=639)

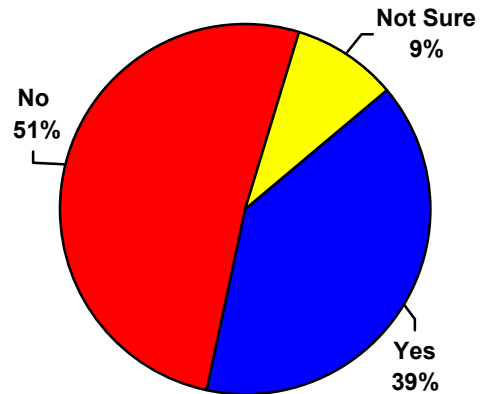


Employers believe their employees would be comfortable asking for time off for caregiving, and more than a third of employees have done so.

Nearly three-quarters of employers (73%) believe that their employees would be comfortable asking for time off for caregiving activities. Four in ten (39%) report that employees have asked for time off to assist an older person.

However, only fourteen percent have requested time off under the Family Medical Leave Act (FMLA). The FMLA provides a means for employees to take unpaid leave for personal reasons, such as caregiving. The FMLA applies to all businesses involved in commerce with 50 or more employees.²

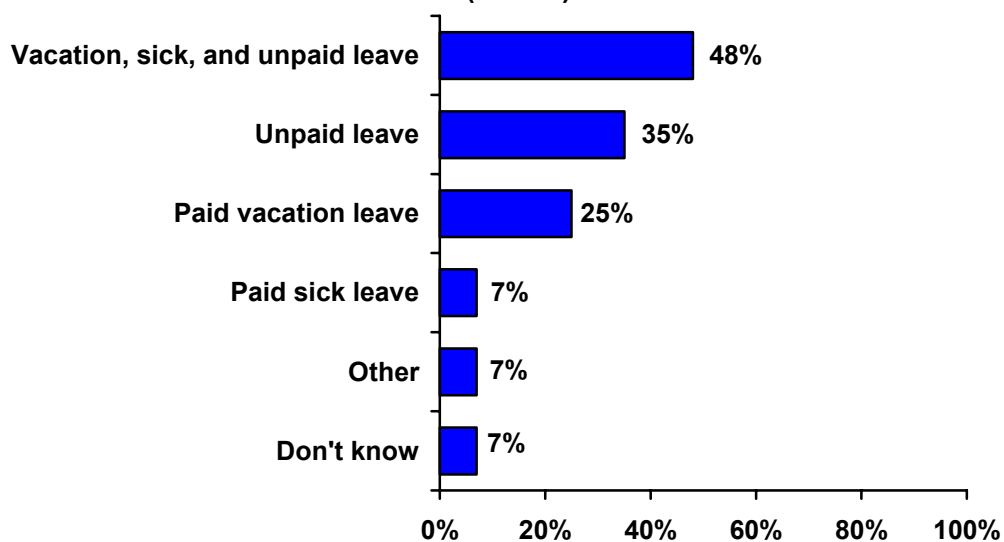
Whether Employees Have Asked for Time off for Caregiving (N=639)



Ohio employees typically would use paid vacation time or 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 an older parent or relative they would use their paid vacation time, sick leave, and unpaid leave to do so. A third said an employee would take unpaid leave.

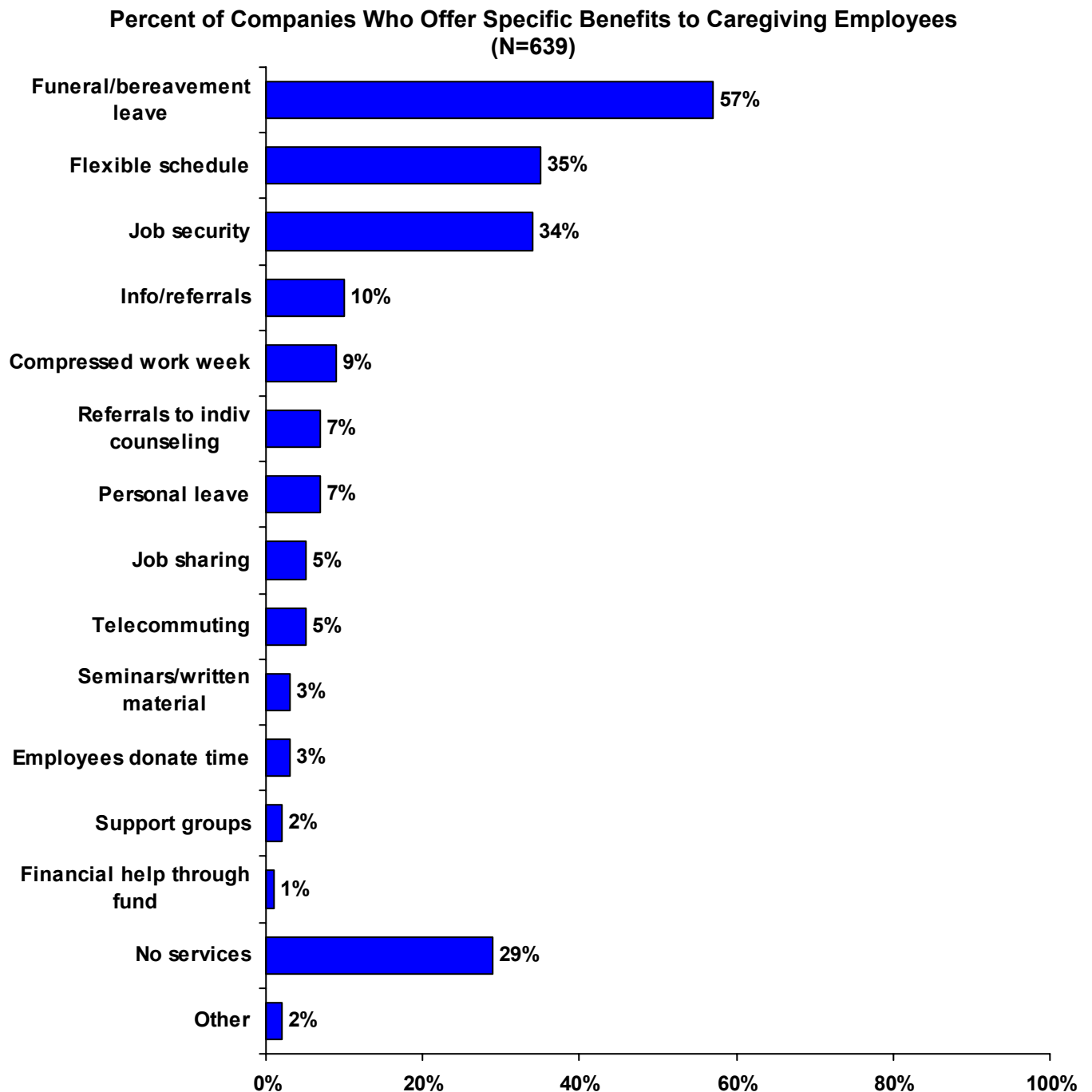
Type of Leave Employees Would Use if They Took Time Off to Take Care of an Older Relative (N=639)



² www.dol.gov/compliance.

Nearly six in ten companies offer funeral leave for caregiving employees.

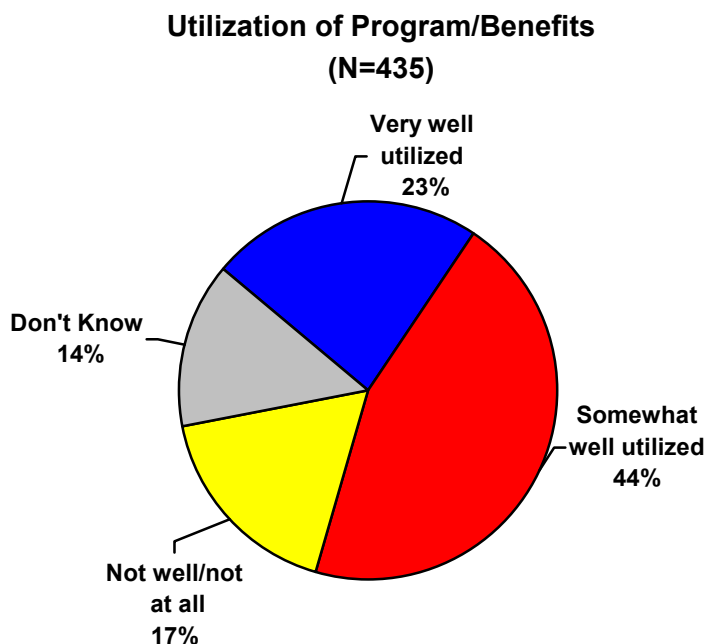
Funeral/bereavement leave, flexible work schedules, and job security are the most commonly offered benefits for caregiving employees among companies in Ohio. Some companies also offer more creative benefits, such as support groups, special funds, and allowing other employees to donate time to the caregiving employee. However, fully 29 percent offer no services to caregiving employees.



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

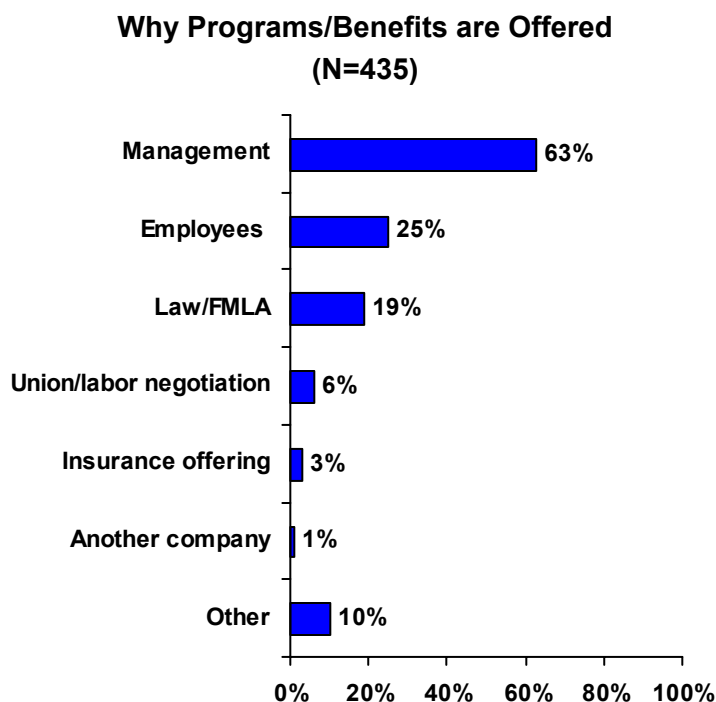
Six in ten (61%) companies that have a program or benefit for caregivers (n=435) say that the program or benefit has been in place for five years or more. One in six (16%) say the program has been in place for two to five years.

In addition, more than two-thirds (67%) say the program or benefit is *very* or *somewhat well utilized*.



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

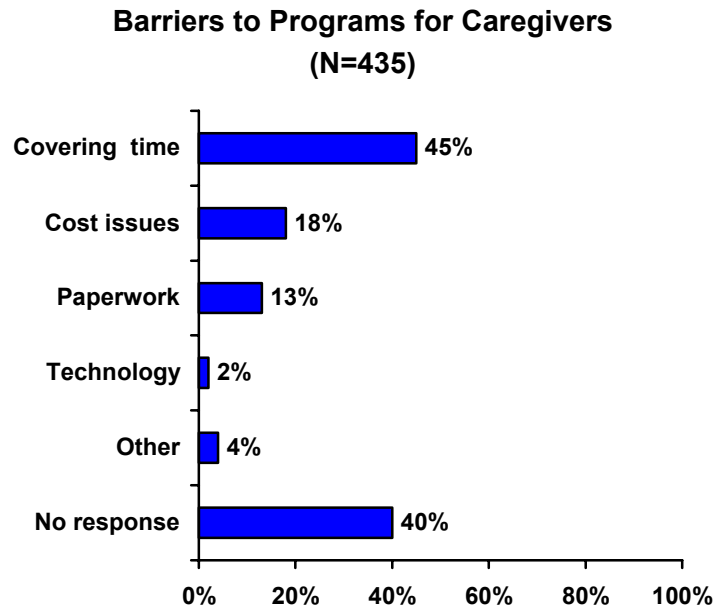
Six in ten respondents say that programs and benefits are offered to caregivers because management saw a need for them. A quarter say that employees asked for such programs, while two in ten say they were mandated by law or by the Family Medical Leave Act.



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

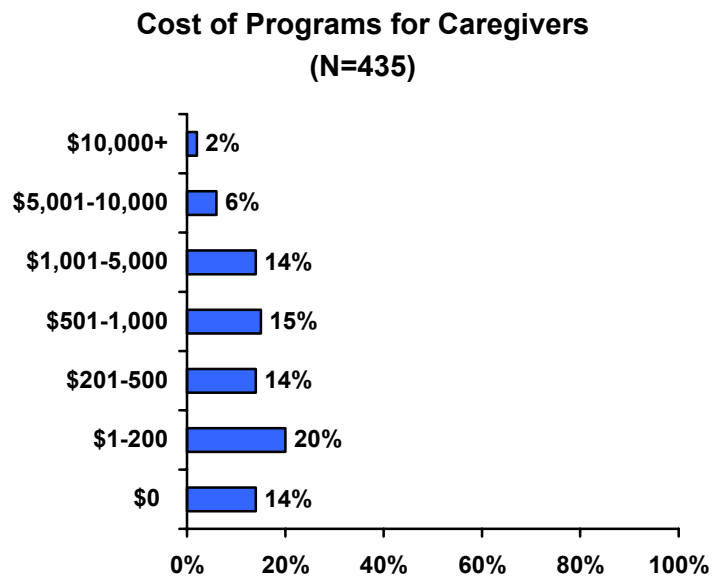
Over four in ten employers say that covering the employee's time is the main barrier to getting programs and benefits for caregivers implemented.

Almost two in ten say that cost is a barrier. Four in ten did not list a barrier for implementing such programs.



The cost of programs for caregivers varies.

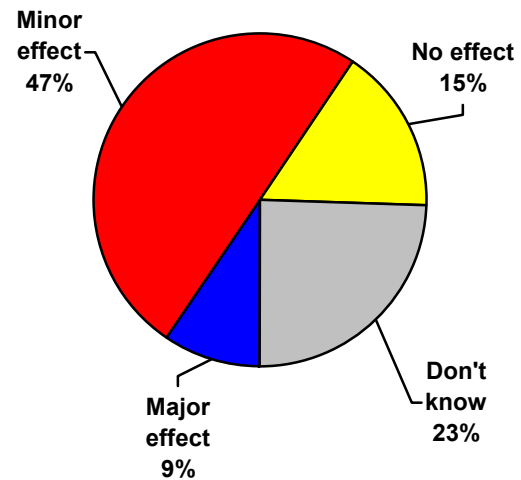
Employers give widely different responses to how much money it costs per year to provide the programs or benefits for caregivers. The cost per person for these benefits is not affected by the size of the company or whether it is non-profit, for-profit, or a government agency. Rather, the cost is determined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



Employers recognize that caregiving affects employee performance.

Employers who provide benefits to their employees were asked how much providing caregiving to an older person affects employee performance. One in ten said it had a major effect, while 47 percent said it had a minor effect. Almost a quarter said they did not know how much caregiving effected employee performance.

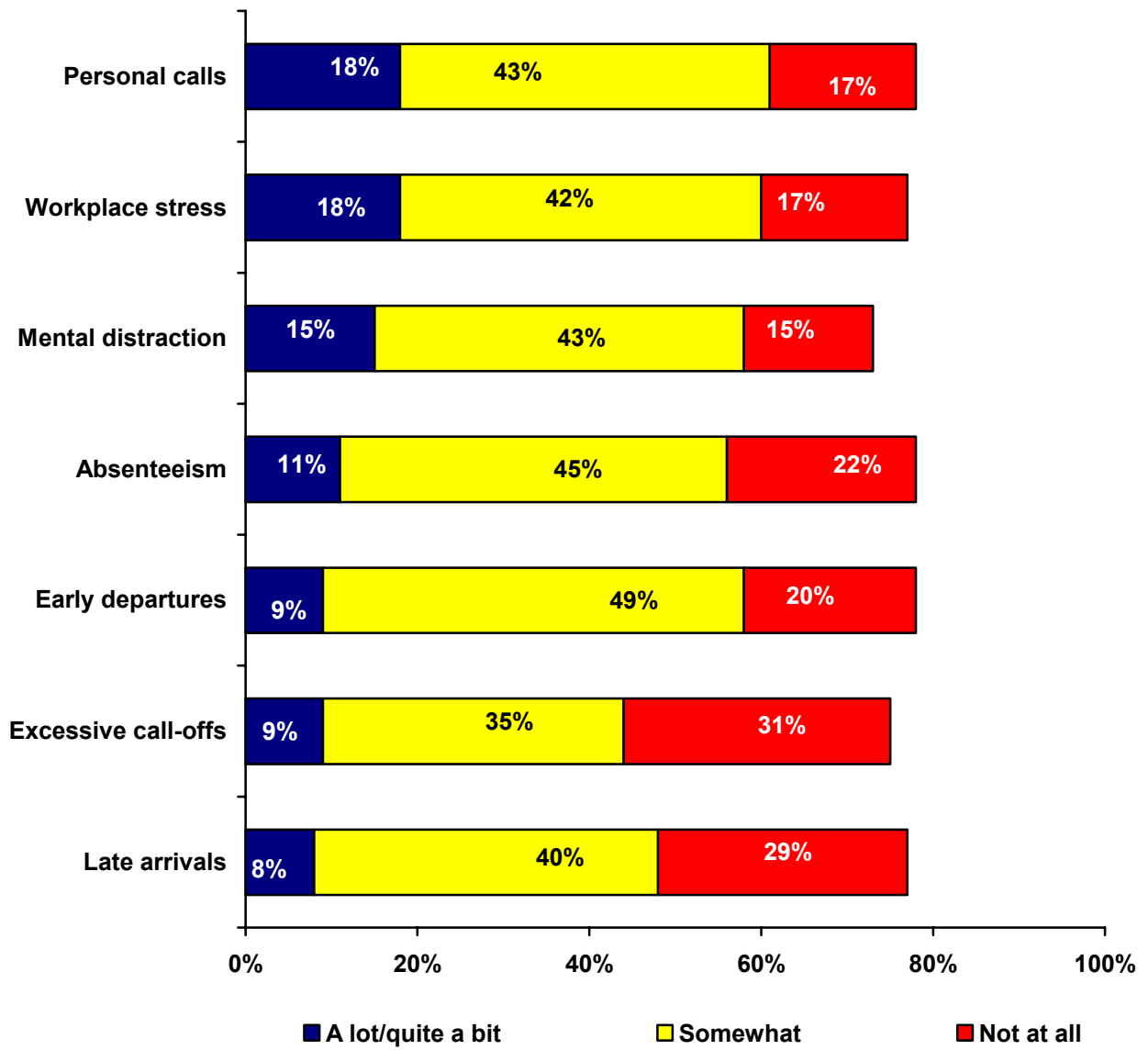
**Whether Employees are Caregivers
(N=435)**



Employers are aware that caregiving responsibilities influence employee performance factors.

Many employers show an 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 a quarter (25%) of respondents were either not sure or gave no response to each of the factors listed (see Appendix A).

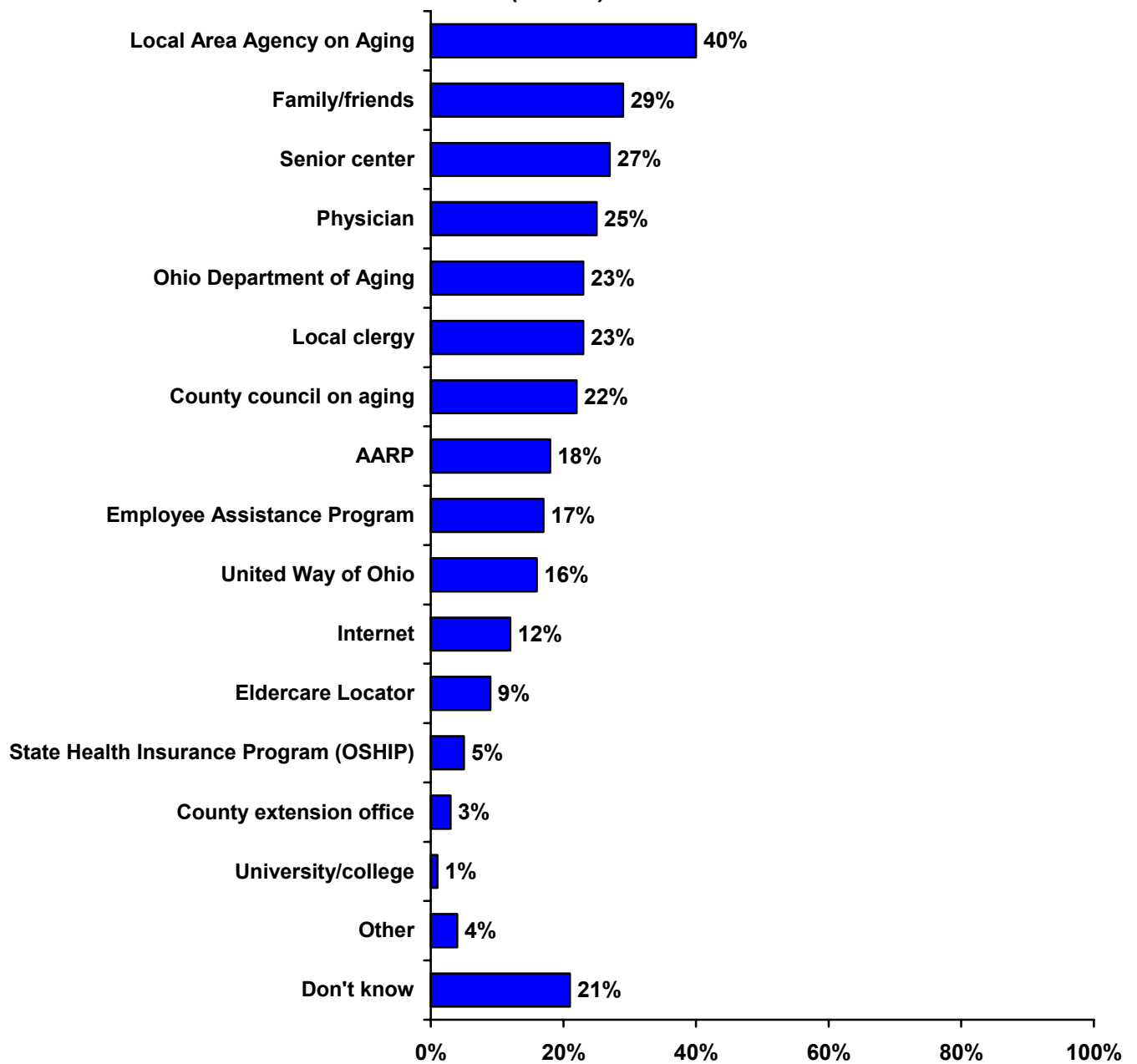
**Extent That Employers Think Elder Care Responsibilities Influence
Workplace Performance Factors
(N=435)**



Employers would refer employees to the Local Area Agency on Aging for help with caregiving issues.

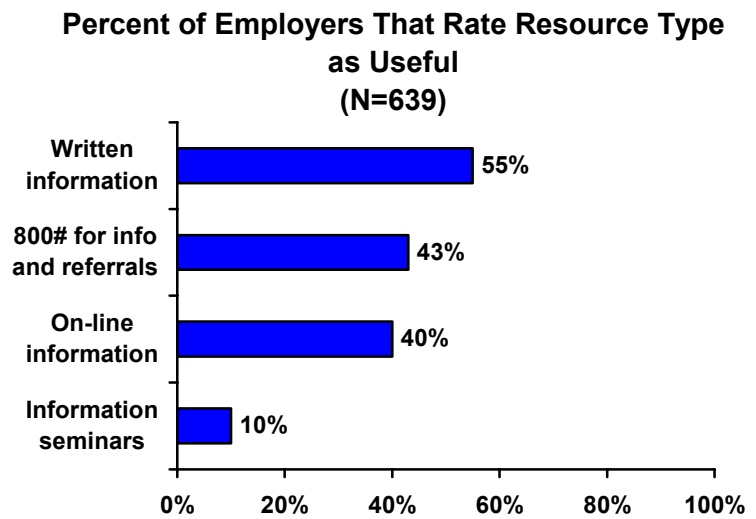
Employers say they are most likely to refer employees with caregiving needs to the Local Area Agency on Aging. At least a quarter would refer employees to family and friends, a senior center, or a physician. More than one in six would refer employees to AARP.

**Where Employers Refer Employees with Caregiving Issues
(N=639)**



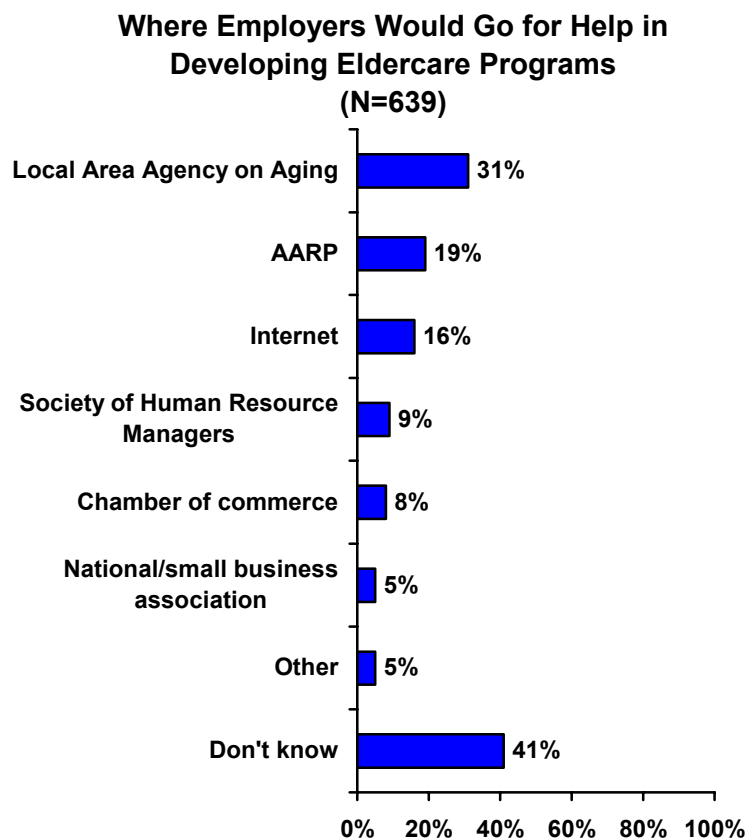
Employers want information on caregiving and would prefer that information to be written.

Six in ten (63%) employers want information on low- or no-cost resources available for caregivers. Over half say that written information would be useful, and four in ten would find an 800 number or online information useful. Fewer identify information seminars as a useful tool.



Employers say they would look to the Local Area Agency on Aging or to AARP for help in developing an eldercare program.

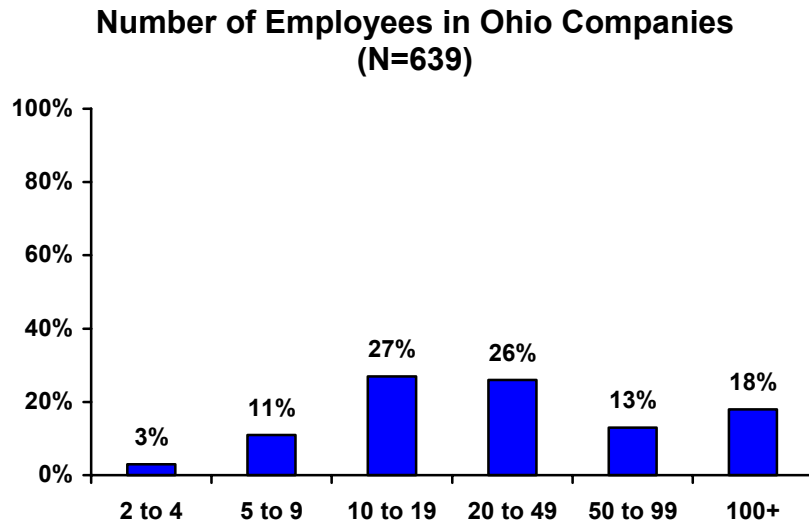
Three in ten employers say that they would go to the Local Area Agency on Aging for help in developing an eldercare program to aid caregivers. Almost two in ten say they would turn to AARP. However, more than four in ten say they don't know who they would turn to for help.



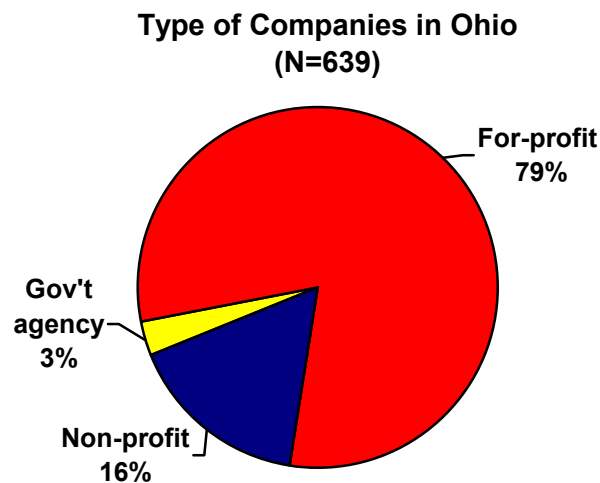
Company Characteristics

Many Ohio companies that responded have between 10 and 49 employees and are for-profit businesses.

Half (53%) of Ohio companies have between 10 and 49 employees. Only fourteen percent report having fewer than 10 employees, while 18 percent say they have 100 or more.



The majority of businesses that responded are for-profit and are not part of a larger company (84%). Moreover, nearly all companies in the state (87%) say benefit decisions are made locally and not somewhere else.



Conclusions

Employers in Ohio 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 personal calls, workplace stress, and mental distraction.

Nearly all employers offer some employee benefits, and many offer funeral or bereavement leave, flexible work schedules, 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 Ohio has the opportunity to take the lead in educating employers on the issues of caregiving in the workplace. When an employee needs information about caregiving, many employers would refer them to AARP. AARP Ohio is thus poised to help employers across Ohio 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 Ohio. A pre-notification letter was then sent to the human resources department of 2,000 businesses in the state of Ohio with more than one employee. This was followed by the survey itself, a reminder postcard, and a second copy of the survey. 639 (32%) of the businesses contacted responded to the survey. This survey has a sampling error of plus or minus 3.2 percent.

Annotated Questionnaire

2003 Employers and Eldercare Survey

WEIGHTED N = 639, RESPONSE RATE = 32%, SAMPLING ERROR = 3.2 +/-%

(Percentages may not add to 100% due to rounding or multiple responses. A “*” means less than 1%.)

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

<u>%</u>	
*	Only one (self-employed)
3	2-4
11	5-9
27	10-19
26	20-49
13	50-99
18	100 or more
0	Don't know
1	No Response

2. Are any of your employees offered any benefits, such as health insurance or paid time off?

<u>%</u>	
91	Yes
8	No
0	Don't know
1	No Response

A caregiver can be anyone who provides unpaid help to a relative or friend who is ill, 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. To your knowledge, in the past two years, have any of your employees provided care or assistance to an older person (including a spouse, parent, other relative, or friend)?

<u>%</u>	
55	Yes
26	No [SKIP TO Q5]
18	Don't know [SKIP TO Q5]
1	No Response

4. To your knowledge, approximately what percentage of your employees do you think are providing care or assistance to an older person? (n=352)

<u>%</u>		<u>%</u>	
50	0-5%	3	50-69%
17	6-10%	1	70% or more
7	11-19%	*	Other:
5	20-29%	12	Not sure
3	30-39%	*	No Response
1	40-49%		

5. Have any of your employees asked for time off to assist an older person?

<u>%</u>	
39	Yes
51	No
9	Not sure
1	No Response

6. Have any of your employees requested time off under the Family Medical Leave Act to assist an older person?

<u>%</u>	
14	Yes
81	No
5	Not sure
1	No Response

7. Do you believe your employees would be *comfortable* asking for time off to take care of or assist an older person?

<u>%</u>	
73	Yes
7	No
20	Not sure
1	No Response

8. If an employee took time off to take care of or assist an older person, what kind of leave would they use? Would they use....

<u>%</u>	
25	Paid vacation leave
7	Paid sick leave
35	Unpaid leave
48	All of the above (vacation, sick, and unpaid leave)
7	Other (Please Specify _____)
7	Don't know
1	No Response

9. Does your company have an Employee Assistance Program?

<u>%</u>	
17	Yes
75	No
6	Not sure
1	No Response

10. Does your company offer any of the following services or programs for employees who are caring for an older person? (CHECK ALL THAT APPLY)

<u>%</u>	
1	Financial help through a special fund that employees contribute to voluntarily
7	Additional personal leave to be used for eldercare
3	Allow employees the opportunity to donate their sick time to another employee who is caring for an older relative
35	Flexible work schedule to accommodate time needed to provide eldercare
2	Support groups
10	Information and referral assistance to help find eldercare providers and resources
34	Job security for employee who need to take time off to provide eldercare
5	Telecommuting or allowing employees to work from home
5	Job sharing
3	Information about eldercare through seminars or written materials
7	Referrals to individual counseling
9	Compressed workweek that allows employees to work longer but fewer days
57	Funeral/bereavement leave
*	Subsidized care or care vouchers
2	Other (Please specify): _____
29	No services are offered [SKIP TO Q19]
3	No Response

11. On average, how well would you say the above program(s)/benefit(s) that are offered to caregivers are utilized? (n=435)

<u>%</u>	
23	Very well utilized
44	Somewhat utilized
10	Not well utilized
7	Not at all utilized
14	Don't know
2	No Response

12. On average, how long has the above program(s)/benefit(s) been in place? (n=435)

<u>%</u>	
1	Less than 6 months
2	Between 6-12 months
5	Between 1-2 years
16	Between 2-5 years
61	5 years or more
13	Don't know
3	No Response

13. What were the circumstances that led to the above programs(s)/benefit(s) being offered? (CHECK ALL THAT APPLY) (n=435)

<u>%</u>	
25	Employees asked for it
63	Management saw a need
1	Another company implemented program successfully
3	Insurance offering
6	Union/labor negotiation
19	Law/FMLA
10	Other:
7	No Response

14. Were there any barriers to getting the program(s)/benefit(s) mentioned in question 10 implemented? (CHECK ALL THAT APPLY) (n=435)

<u>%</u>	
18	Cost issues
13	Increased paperwork/administrative issues
45	Covering the employee's time
2	Technology issues
4	Other: (Please Specify _____)
40	No Response

15. About how much do you think it costs a year to provide the programs/benefits listed in Question 10 per employee? (n=435)

<u>%</u>	
14	\$0
20	\$1-200
14	\$201-500
15	\$501-1,000
14	\$1,001-5,000
6	\$5,001-10,000
2	\$10,001 plus
15	No Response

16. To what extent do you think eldercare responsibilities influence the following performance factors in your company? (n=435)

	A lot	Quite a bit	Somewhat	Not at all	Not Sure	No Response
a. Workplace stress	6%	12%	42%	17%	15%	9%
b. Absenteeism	5%	7%	45%	22%	15%	8%
c. Late arrivals to work	2%	6%	40%	29%	15%	8%
d. Early departures from work	2%	7%	49%	20%	13%	9%
e. Mental/emotional distraction	4%	11%	43%	15%	18%	10%
f. The amount of personal calls made at work	5%	14%	43%	17%	13%	8%
g. Excessive sick days/call-offs	3%	6%	35%	31%	15%	9%

17. How much do you think providing care or assistance to an older person affects employee performance in your company or business? (n=435)

<u>%</u>	
9	Major effect
47	Minor effect
15	No effect
23	Don't know
6	No Response

18. If an employee was having difficulty caring for an older person and came to you for assistance, where would you refer the employee for help? (CHECK ALL THAT APPLY)

<u>%</u>	
23	Ohio Department of Aging
40	Local Area Agency on Aging
5	State Health Insurance Program (OSHIP)
9	Eldercare Locator (national toll free information and referral line)
22	County office or council on aging
1	Nearby university or college
3	County Extension office
29	Family/friends
23	Local clergy
25	Physician
27	Senior center
17	Employee assistance program
18	AARP
12	Internet
16	United Way of Ohio
6	Other: _____
21	Don't know
5	No Response

19. If there were low- or no-cost resources available for employees caring for older persons, would you be interested in having or knowing about these resources?

<u>%</u>	
63	Yes
12	No
22	Don't know
4	No Response

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

<u>%</u>	
55	Written information
40	On-line information
10	Information seminars
43	An 800 number for information and referrals
*	Other: _____
14	Don't know
5	No Response

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

<u>%</u>	
8	Chamber of commerce
19	AARP
1	A national business education organization
4	Small business association
9	Society of Human Resource Managers (SHRM)
31	Local area agency on aging
16	Internet
5	Other: _____
41	Don't know
5	No Response

Demographic Information

The following questions are for classification purposes only.

22. What best describes your company?

<u>%</u>	
16	Non-profit
79	For-profit
3	Government agency
3	No Response

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

<u>%</u>	
13	Yes
84	No [SKIP TO Q25]
*	Don't know [SKIP TO Q25]
2	No Response

24. Approximately how many employees does your company or organization have nationwide? _____ (n=85)

<u>%</u>		<u>%</u>	
2	1-25	11	201-500
5	26-50	8	501-1000
7	51-100	32	1001 and up
6	101-200	29	No Response

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

<u>%</u>	
87	On location
8	Somewhere else
1	Don't know
4	No Response

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

<u>%</u>		<u>%</u>	
23	0-10%	11	41-50%
12	11-20%	8	51-60%
5	21-30%	11	61-70%
6	31-40%	23	71% or more
		2	No Response

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

<u>%</u>	
7	18-29
73	30-45
17	45+
3	No Response

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

<u>%</u>		<u>%</u>	
68	0-10%	3	41-50%
11	11-20%	3	51-60%
6	21-30%	3	61-70%
3	31-40%	1	71% or more
		2	No Response

29. What area of Ohio is your company located in?

<u>%</u>	
38	North/North East
16	North/North West
8	South/South East
18	South/South West
18	Central
3	No Response

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 **October 17, 2003**.

AARP
Knowledge Management
For more information contact Erica Dinger (202) 434-6176.