

# Caregiving:

The Impact on the Workplace





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Caregiving is not just a social issue, it is a critical workplace issue. Caregiving for a relative who has a chronic condition or for an elderly loved one is typically provided by a family member. And most of these family members are employed. At present, roughly 20 percent of the workforce is estimated to be involved in caregiving.<sup>1</sup> And, as the number of elderly Americans grows, the number of employed caregivers—and the \$33 billion annual cost to business with another \$13 billion in associated health care costs—is likely to continue upwards.<sup>6</sup>

In fact, in the next two decades, the number of older Americans will more than double, exceeding 70 million by 2030. The fastest growing segment of the population are those age 85 and older, a segment that is most likely to be frail and have chronic conditions, such as diabetes, arthritis, lung and heart disease.<sup>1</sup> Given rising healthcare costs and shorter hospital stays, the care of these older Americans will increasingly fall on their children, friends, and other relatives—unpaid caregivers who are, for the most part, still in the workforce. Many of them are at the peak of their careers.

The current figures are already staggering. Today, nearly 34 million caregivers provide assistance to people age 50 and older, and 80 percent of the care of older adults is provided by family and friends.<sup>1</sup> Meanwhile, more than half (59 percent) of the nation's unpaid caregivers are in the workforce.<sup>2</sup>

### Striking a Balance

## The Costs are Steep

For the caregiver, the burden of attending to the back-breaking tasks involved in everything from running errands to handling complicated post-hospitalization medical care exacts a toll on their work. In one report, more than 50 percent of employee caregivers said their caregiving responsibilities had affected their work.<sup>1</sup> And, in a 2009 survey, many said that they do not feel prepared to face unforeseen events, such as loss of income due to eldercare. More than 40 percent reported they worry about caring for elderly parents.<sup>3</sup>

For business, the costs of employees with caregiving responsibilities are extensive. The consequences include employee absenteeism and presenteeism (present on the job but not performing up to par), arriving late or leaving early, taking a leave of absence, choosing early retirement, turning down promotions, taking a less demanding job or quitting work altogether.<sup>4</sup> Add to this the fact that workers who provide caregiving services have more health problems than non-caregivers, and the price tag reaches critical proportions.<sup>5</sup>

Gail Hunt, president and CEO of the National Alliance for Caregiving, details the effects: “Caregivers have more unplanned absences. Their performance on the job is also compromised by a lack of focus on their work due to distractions, like phone calls and care coordination that occupy their time.”<sup>5</sup>

As the situation will only grow worse—and more expensive—with the aging population, it’s imperative that employers act now to develop, implement and communicate programs designed to reduce the stress of caregiving, and minimize its effects in the workplace.

## By the Numbers: The Demographics

Just who are today’s caregivers? Surveys show caregivers include all ages, races, and both genders. A revealing 2009 study entitled *Caregiving in the U.S.*, conducted by the National Alliance for Caregiving and AARP, along with Census figures and other reports, find the following:

- About 87 percent of caregivers provide care to someone over age 50, and 60 percent of those caregivers work full time.<sup>6</sup>
- About 15 percent of caregivers provide care to someone who lives more than an hour away.<sup>6</sup>
- More than a third have children or grandchildren under the age of 18 in the household.<sup>4</sup> (See chart, “*The Sandwich Generation*,” page 6).
- More than a third of families had at least one family member with a disability, and about one in 10 families with children under 18 years of age included a child with a disability.<sup>7</sup>

- More than 60 percent of caregivers are women.<sup>6</sup> Overall, women of color may devote more time to caring for extended family members, including grandchildren and elderly relatives, than white women.<sup>7</sup>
- An estimated 60 percent of working men are caregivers, although they are far less likely to discuss their caregiving role or seek help than women.<sup>10, 11</sup>
- Most caregivers live in suburban settings.<sup>4</sup>

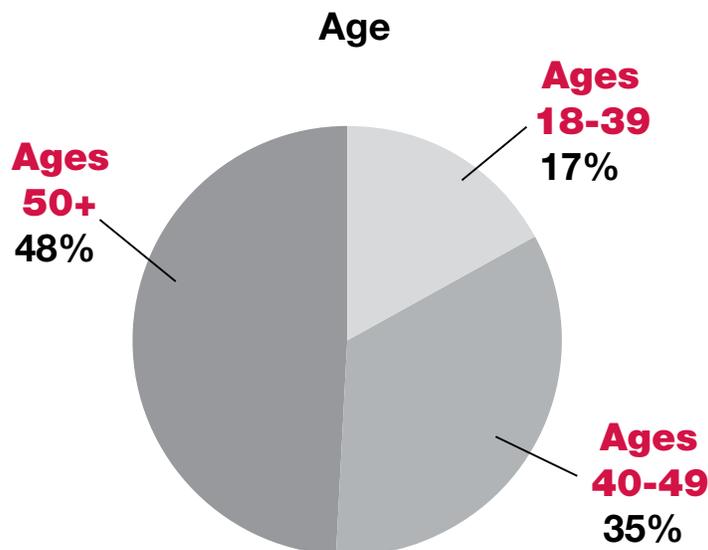
## The Sandwich Generation

“Sandwiched couples”—those caring for both children and older parents—make up an estimated nine to thirteen percent of American households, according to a 2007 study sponsored by the Alfred P. Sloan Foundation. Typically, the couple is a 44 year-old man and a 42 year-old woman, married 18 years, both working full-time. On average, they have two children in the household, and provide care or other assistance to two aging parents. Each spouse spends an average of one or more workdays a week caring for elderly relatives, with the wife spending two hours more per week than the husband.<sup>9</sup>

## Younger Workers

Employers should not assume that adult caregiving affects only middle-aged or older workers. A 2010 analysis showed that the aging population will force ever greater numbers of younger employees into the family caregiving role, putting a significant burden on those age 18 to 39 [Figure 1].<sup>10</sup>

**Figure 1: Age of Caregiving Employees**



Source: The MetLife study of working caregivers and employer health care costs, MetLife Mature Market Institute, 2010.



## Caregivers are Both Genders

**Women as caregivers.** By most studies, women remain the predominant caregivers. Overall, 66 percent of caregivers are women, with the vast majority of caregivers caring for adult relatives, a third of which are their own parents, according to a 2009 study.<sup>4</sup>

In a 1999 national study among working women who were also caregivers, the toll on their work was reported as follows:<sup>12</sup>

- One-third cut their hours
- Nearly 30 percent of women gave up a job promotion, training or assignment
- One-fifth took a leave of absence and another 20 percent switched from full-time to part-time employment
- Sixteen percent quit their jobs because of their caregiving responsibility and 13 percent retired early

***In surveys, the response pattern contradicts the conventional wisdom about family caregiving as a “women’s issue.” The vast majority of both men and women report the need to modify work schedules and miss some work as a result of caregiving responsibilities.***

**Men as caregivers.** It’s important for businesses to know that, when it comes to caring for those age 50 and older, over half are working men.<sup>10</sup> An online survey of nearly 1400 employed caregivers at three Fortune 500 companies reported these findings:<sup>11</sup>

- Men are taking responsibility for the same everyday tasks as women— including managing medications, grocery shopping and transportation.
- More men than women are providing care at a distance.
- More men than women reported having to forego work-related travel; a one quarter of respondents of both sexes reported considering a job change as a result of caregiving.
- Men are less likely than women to discuss caregiving with co-workers.
- Two-thirds did not know about existing corporate eldercare benefits.

## Impact of Caregiving on Employee Health

Overall, individuals responsible for caregiving—including employee caregivers—have more health-related problems than employees who are non-caregivers. In fact, a 2005 survey from The Commonwealth Fund found that 45 percent of caregivers had one or more chronic conditions, compared to 24 percent of those with no caregiving responsibilities (Figure 2).

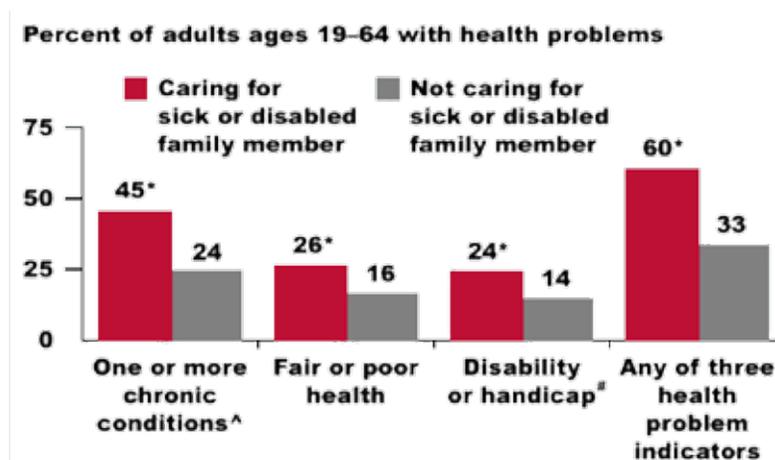
In general, caregivers (whether working or not) have higher levels of depression, heart disease, blood pressure and immune function, and are more likely to die earlier than non-caregivers.<sup>13</sup>

In one of the first and most important studies to evaluate the health of working caregivers, a 2010 report from the National Alliance for Caregiving and MetLife, found that employee caregivers have a higher incidence of diabetes.

Younger caregivers (age 18 to 39, male or female) demonstrated significantly higher rates of high cholesterol, hypertension, chronic obstructive pulmonary disease (COPD), depression, kidney disease, and heart disease in comparison to non-caregivers of the same age.<sup>10</sup> Additionally, workers who also have caregiving responsibility report more difficulty than non-caregivers in taking care of their health, including participating in preventive health screenings.

Among female employees age 50 and older providing eldercare, 17 percent reported fair or poor health compared to 9 percent of non-caregivers, the MetLife report showed. Further, 10 percent of caregivers had missed at least one day of work over a two week period because of health issues compared to 9 percent for non-caregivers.<sup>10</sup>

**Figure 2: Chronic Health Conditions Among Caregivers in General**



\* Significant difference at  $p < .01$  or better. <sup>^</sup> Chronic conditions include heart attack/disease, cancer, diabetes, or arthritis. <sup>#</sup> Disability, handicap, or chronic disease that prevented full participation in daily work, housework, or other daily activities. Source: The Commonwealth Fund Biennial Health Insurance Survey (2003).

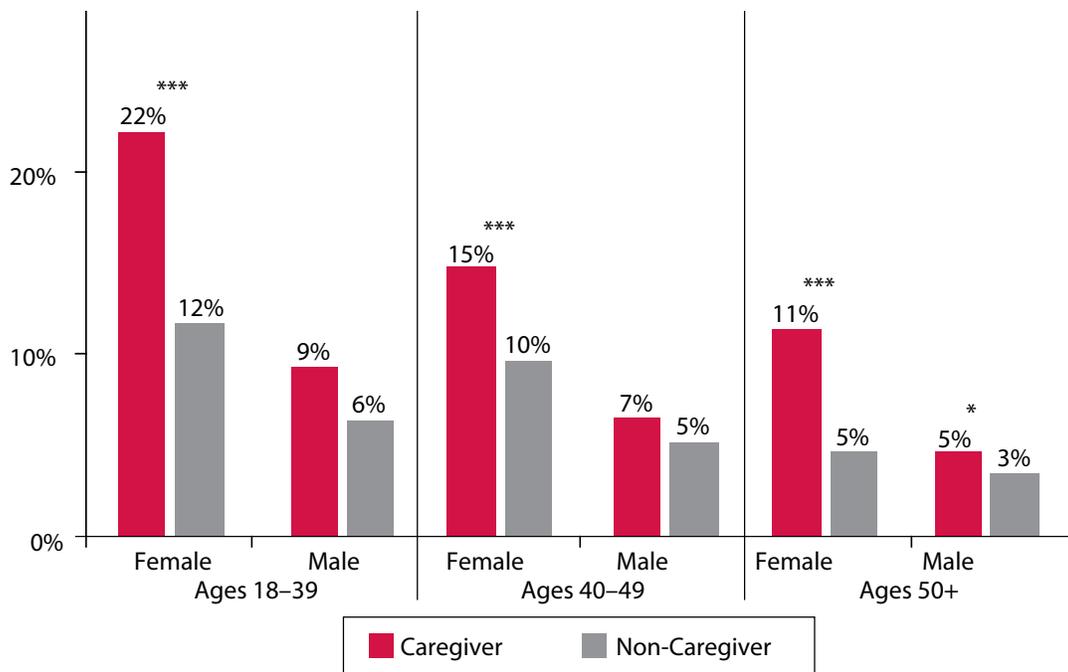
Source: Ho, A., Collins, S.R., Davis, K., et. al. (2005, August). A Look at Working-Age Caregivers' Roles, Health Concerns, and Need for Support. (Issue Brief). The Commonwealth Fund, 11: 1-12.

## Caregiving and Stress Levels

The MetLife and National Alliance for Caregiving survey on working caregivers found that one in five female caregivers age 18 to 39 said that stress was nearly always present in their lives, nearly twice as many as those who were not caregivers and for male caregivers. (Figure 3).<sup>10</sup> In focus groups, women report that the stress of caregiving leads to feelings of depression and helplessness, poor eating habits, and disturbed sleep.<sup>14</sup>

And a startling four-year study from Harvard researchers revealed that, in general, women who provide care more than 36 hours each week for an ill or disabled spouse were almost six times as likely to suffer from symptoms indicative of depression or anxiety as those without caregiving responsibilities. Those who cared for their ill parents were twice as likely to have such symptoms.<sup>15</sup>

**Figure 3: Impact of Caregiving on Stress Levels at Home**



\* Significant difference at .05 level. \*\*\* Significant difference at .001 level.

Source: The MetLife study of working caregivers and employer health care costs, MetLife Mature Market Institute, 2010.

## The Cost of Caregiving to Business

In a report evaluating more than 17,000 employees at a large American corporation, those caring for elderly people cost employers 8 percent more in medical costs than those without caregiving responsibilities. The authors estimated that the additional medical costs to U.S. employers of caregiving employees are \$13.4 billion a year.<sup>10</sup>

### The price of supervising caregiving employees

Workplace caregiving issues have widespread effects. Non-caregivers may experience an additional workload when coworkers leave or miss work to manage an emergency or sudden illness. They may also have to pitch in during a prolonged absence. And the stress from an employed caregiver can spread to others. Furthermore, supervisors who lack the skills to effectively manage the caregiving situation can make the problems worse.<sup>16</sup>

The Eldercare Taskforce of the New York Business Group on Health estimates that supervisors of caregiving employees spend an average of 55.7 million hours a year providing emotional support, arranging for coverage, counseling employees about benefits, and coping with workplace disruption. Overall, these tasks cost about \$800 million annually.<sup>21</sup>

### Possible signs of eldercare work/family conflicts<sup>1</sup>

- Excessive personal phone use during office hours.
- Tardiness and absenteeism that far exceed company standards.
- Claims for sickness benefits at a much higher than usual rate.
- Serious distraction on the job that is reducing productivity (work is not properly completed or has to be done over by another coworker).
- Mood swings and hostility that have fellow employees confused and reluctant to work with the troubled person.

### Lost productivity

More than half of nearly 100 employee caregivers in one study said they were less productive at work. And about half had to take time off from work during the day for eldercare. At least a third said they had to take a full day off from work for caregiving issues.<sup>17</sup> In another study, nearly half of parents of children with mental health disorders reported that they had to quit work to care for their children, while almost 30 percent said they had been fired because of the affect their caregiving responsibilities had on their work.<sup>18</sup> (see figure 4]

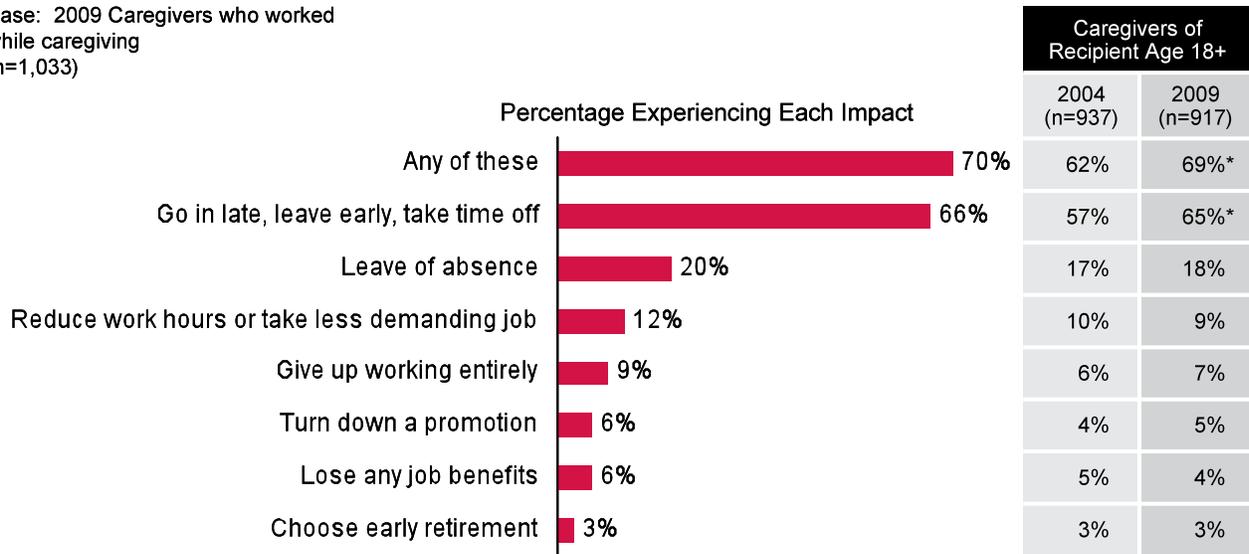
When surveyed, 66 percent of caregivers in a 2009 analysis from the National Alliance for Caregiving reported that they arrived later and/or left earlier to provide care—nearly 10 percent more than who reported such workday changes just five years earlier.<sup>4</sup>

“It is without a doubt a juggling act,” notes Elinor Ginzler, senior vice president of Livable Communities Strategies for AARP. “The average amount of time that somebody is providing care is 19 hours a week, which is in itself, a part-time job.”<sup>19</sup>

## Figure 4: Impact of Caregiving on Employee Productivity

Q34. In your experience as both a worker and a caregiver, did you ever...?

Base: 2009 Caregivers who worked while caregiving (n=1,033)



Source: Caregiving in the U.S.: Executive summary, National Alliance for Caregiving.

Absenteeism, workday interruptions and those who quit work have a profound effect on the bottom line. In fact, about two percent of caregivers leave the workplace each year. This costs employers an estimated \$2.8 billion in replacement costs. Other costs include:<sup>6</sup>

- \$3.4 billion from absenteeism
- \$824 million from coming in late and/or leaving early
- \$2.8 billion due to workday interruptions
- \$1.6 billion from care crises
- \$780 million from the cost of supervisory time
- \$1.4 billion in unpaid leave
- \$3.3 billion from reduced hours

### The total cost

In total, the cost to employers, as reported in 2006, for full-time workers who provide intensive caregiving support is \$2,441 per employee per year, or an aggregate of \$17.1 billion. If all employees caring for individuals over age 18 were considered, the total costs are nearly twice that: \$33.6 billion.<sup>6</sup>



## Family Care Discrimination: A Growing Issue

The Center for WorkLife Law at Hastings Law School recently reported on a “boom” in family discrimination lawsuits as employees charge discrimination based on their caregiving responsibilities, whether for children or aging relatives. The report found that litigation by workers who care for children or aging parents has increased 400 percent in the past 10 years.<sup>20</sup>

The Center also noted that the average verdict in such cases was more than \$500,000. While the majority of cases dealt with discrimination related to pregnancy and maternity leave, nearly 10 percent was related to eldercare and about 20 percent for all caregiving.<sup>20</sup>

## New EEOC Recommendations

In 2007, the Equal Employment Opportunity Commission (EEOC) released a new enforcement guidance discussing discrimination against workers with caregiving responsibilities (elderly and disabled family members, as well as children).<sup>7</sup> It recommended that employers review their hiring, attendance, promotion, incentive pay, benefits and leave policies, to ensure that they do not negatively impact employees with family caregiving responsibilities.

The EEOC also suggested that employers consider adding family caretaking responsibilities as a category to their nondiscrimination policies. In addition, the commission noted that training supervisors and Human Resources personnel about what constitutes family-related discrimination and how to handle complaints is essential. Such training should include information about common, stereotyped assumptions about family caregivers as employees and common patterns that give rise to liability.<sup>8</sup>

## The Clear Demand for Support

When it comes to caregiving programs, employees say they want:<sup>21</sup>

- One phone number to call to look for care (consolidated service)
- A way to find information on caregiver rights, elder rights, caregiving services and their costs
- Help balancing their work and family responsibilities
- Support to manage their emotional and physical stress

## Workplace Support

The good news is that research shows that providing support, ranging from simple information and referral to the more substantial, such as counseling, respite care, education and training to caregivers, can reduce the negative health and work-related effects of caregiving and improve overall wellbeing.<sup>22, 23, 24, 25, 26</sup>

***“If an employee is forced to choose between caring for a loved one and devoting themselves to work, the company will lose. That loss will most certainly be in work quality and, more deleterious in the long term, in the loss of the hearts and minds of employees in their commitment to the firm.”***

— Maureen Corcoran  
Vice President of Health, Life and Inclusion  
Prudential Financial, Inc.<sup>27</sup>

Depending on the resources and the particular needs of the employees, there are a variety of support programs.

**Paid time off (PTO) programs.** A PTO program replaces programs that are distinctly designated for vacation and sick time with a single block of “personal days” that employees control. Such programs give employees the flexibility to take time off when they need it for whatever purpose, including caregiving.

**Flexible schedules and telecommuting.** Allowing employees to start or end their workday earlier or later or conduct work at home can offer a great deal of relief for caregivers. For instance, Cisco Systems’ telecommuting program resulted in a \$195 million savings in 2003 from increased worker productivity.<sup>28</sup>

**Employee assistance programs (EAP).** EAP programs offered by the HR department as part of the employer’s health insurance plan, can provide personal and family counseling, crisis intervention, bereavement and other assistance, to help employees better balance work and caregiving responsibilities.

**Wellness programs.** Caregivers who care for the elderly can get help with coping strategies and other techniques to manage their own stress.

**Information and referral services.** Valuable information can be provided through educational seminars, caregiver support groups, and referral to Eldercare Locator, a federally funded, toll-free number that connects caregivers with local resources.<sup>29</sup> Intel and Nike are examples of companies that offer a six-week skill-building course, called “Powerful Tools for Caregivers.”<sup>30</sup>

**Direct services.** These services include onsite adult day centers, subsidies, vouchers and discounts for child or eldercare, including respite care.

**Healthcare advocacy.** Offering an expert who can personally address healthcare issues during business hours and anywhere in the country, such as helping to find doctors, arranging transportation, locating nursing homes, assisting with Medicare, and interacting with insurance and providers, can help employees reduce worry and stay focused on their job.

**Flexible benefits plans, cafeteria plans, dependent care assistance plans.** Some companies allow employees to add an adult family member to a health care plan under their family rate.

**Geriatric care management support.** An increasing number of companies contract to provide basic assessment, care planning and monitoring of services for employees caring for elderly loved ones.<sup>32, 33</sup>

## Impediments to Workplace Programs

Utilization of company programs for caregivers is reportedly as low as two percent, by some reports.<sup>10</sup>

A series of focus groups revealed the following impediments to implementing a successful support program:<sup>31</sup>

- **Misunderstanding.** Employees and employers often have very different ideas of what “eldercare” means. It is important that the company and supervisors clearly communicate the services that are offered, who is eligible and how much the company pays.
- **Delay in accessing services.** Caregivers typically try to manage their burden on their own or may even deny the need for services, often turning to employer programs only when they are in crisis. As one HR professional noted: “Employees need to understand that these [employer caregiver] programs are meant to be used before a crisis arises” in order to maximize their benefits for everyone.<sup>32</sup> Earlier support could help head off serious consequences, such as the need to quit work or avoid health-related problems from the stress of caregiving.

## Success Stories

No two workplace caregiver support strategies are alike. Here are a few examples of programs instituted by notable organizations and companies.

**Children’s Memorial Hospital.** This Chicago-based hospital offers employees 20 days of back-up care annually for each elderly dependent. “My siblings were astonished at the level of care that could be provided through this benefit,” said one employee who took advantage of the program to care for her elderly father. “People think of it as a death and dying benefit, but it’s really for the living.”<sup>33</sup>

**AstraZeneca Pharmaceuticals, Inc.** The company offers employees six free hours a year of eldercare services, provided in person or via the phone, by a nationwide network of nurse practitioners specializing in geriatrics. Employees also have access to a professional consultant, resource referrals, and a full range of informational, booklets, audiotapes and handouts.<sup>34</sup>

**American Electric Power and the University of Alabama.** Both organizations allow employees to use sick-leave donations for additional time off. Other organizations let employees donate sick-leave time to general accounts that employees can access as needed.<sup>34</sup>

**Hallmark Cards.** The greeting card company provides eldercare counselors, as well as speakers on various topics related to eldercare, such as Alzheimer’s disease and Medicaid benefits.<sup>34</sup>

**PricewaterhouseCoopers.** The accounting company provides “Special Needs Caregivers Circle” to help employees find the resources they need to balance work/life responsibilities.<sup>34</sup>

**Prudential Financial Inc.** Employees pay a \$100 co-payment for a personalized care plan or nursing home evaluation from a geriatric-care specialist.<sup>34</sup>

**McGraw-Hill.** The publisher allows employees to enroll one other adult family member, such as a parent, in their health insurance plan at regular family rates.<sup>34</sup>

## Return on Investment

There are emerging studies on the benefits of employee caregiver support programs, as well as anecdotal reports from leading companies, showing a positive return on investment.

For instance, the Workplace Flexibility 2010 report from Georgetown Law School found that flexible work arrangements helps limit unscheduled absences and increase productivity, in part, by reducing work/life stress. These programs also result in more committed, satisfied and engaged employees, which, in turn, increases productivity and performance.<sup>2</sup> The evidence is supported by a recent report from the President’s Council of Economic Advisers.<sup>28</sup>

An 18-month study examining the impact of workplace caregiving programs on employees found that “presenteeism” improved for employees

who used the geriatric care management program (GCM). “People who used the GCM were more focused on work after using the program than they were before,” the authors noted. The researchers also found that employees who used the program were less likely to report deterioration in their health status over time.<sup>32</sup>

Reports from the following companies also demonstrate positive results.

- **Baptist Health South Florida** offers back-up care for employees caring for family members. In the first nine months of the program, the company realized \$65,000 in savings related to reduced absenteeism.<sup>35</sup>
- **SAS Institute Inc.**, a Cary, North Carolina-based company that develops business analytic software, credits its low employee turnover rate (less than 4 percent compared to the industry average of 15 to 20 percent) to its work/life programming and support.<sup>36</sup>
- **Ernst & Young** reported a significant decrease in turnover rates in the late 1990s after adopting family-friendly policies and benefits and estimated savings in turnover costs at \$17 million.<sup>37</sup>
- **Aetna Insurance** cut attrition in half in the mid-1990s after implementing a part-time return-to-work program after family leave, saving more than \$1 million annually.<sup>37</sup>

Employers can use a variety of metrics to track their own return on investment, including productivity measures, absenteeism, healthcare costs, retention, and turnover costs.

## The Time for Support is Now

“It’s important that employers take a new look at how the workplace supports those employees who also serve as caregivers,” says Donna Wagner, Ph.D., director of the Center for Productive Aging at Towson University in Maryland. “Small modifications are likely to result in large benefits in terms of retention of valued employees, recruitment of talented workers, and a more productive workforce overall.”

Dr. Wagner notes that younger workers entering the workforce with expectations about support for work/family issues and job applicants include family-friendly criteria in their job decisions.

Employers should start by assessing their workplace needs through surveys of employees, including managers. Developing a culture of support is crucial as is management sensitivity training. “Without providing supervisors with skills to effectively manage employees with caregiving duties, employees are not likely to take part in support programs no matter how great they are,” says Dr. Wagner.

The bottom line is that workplace intervention for caregiving support helps create happier, healthier and more loyal employees, and helps workers do *both* jobs successfully.

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## About the Publication

As the nation's leading healthcare advocacy and assistance company, Health Advocate offers this white paper as part of our ongoing webinar series that provides timely research about important health issues impacting the workplace and strategies to meet the challenges. This publication accompanies Health Advocate's webinar, "Caregiving: The Impact on the Workplace" co-sponsored by the National Women's Health Resource Center, the leading independent health information source for women. The paper provides comprehensive research about the scope, impact and costs of caregiving and its role in caregiving-related absences, turnover, replacement, lost productivity and stress-related illness. The research also reviews successful strategies demonstrated to help employees better manage the dual responsibilities of caregiving and work.

## Additional Publications



### Workplace Wellness

More companies recognize that having unhealthy employees has become a critical burden and that wellness programs can provide an effective solution to rising healthcare costs. Instituting wellness programs that help employees adopt healthier behaviors can be important ways to decrease illness, absenteeism, turnover, medical claims, to increase productivity and create a healthier bottom line.



### Obesity in America

Obesity, an alarmingly increasing phenomenon in the U.S., is a major factor in a host of chronic—and costly—conditions from diabetes to heart disease that are correspondingly increasing. Workplace strategies that help promote weight loss can significantly lower risk factors, injuries, absenteeism and, ultimately, healthcare costs.



### Stress in the Workplace

Job stress is a leading source of stress for Americans, costing businesses \$200-\$300 billion a year in terms of lost productivity, disability, absenteeism and presenteeism where employees are present but function below par. Workplace strategies that help employees develop resiliency are becoming a critical component of wellness programs to help lower costs.



### Pandemic Planning

Our nation, indeed the entire world, potentially faces a pandemic of alarming proportions. As health experts and government officials monitor for early warning signs and make plans for handling the public health consequences of an avian flu or related influenza breakout, business leaders must also take steps to prepare for operating their companies under extremely challenging conditions.

## About Health Advocate

Health Advocate™, Inc., the nation's leading independent healthcare advocacy and assistance company, serves more than 6,000 clients including the nation's leading companies—providing more than 18 million Americans with expert, personalized help to resolve healthcare and insurance-related issues. The company offers a spectrum of add-on time- and money-saving solutions designed for both employers and employees.

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