



BALANCING WORK, CHILDCARE AND ELDERCARE:

A VIEW FROM THE TRENCHES

EXECUTIVE SUMMARY

In 2011-2012, Dr. Linda Duxbury of Carleton University's Sprott School of Business, and Dr. Christopher Higgins, of the University of Western Ontario's Ivey School of Business, conducted a national study of work-life balance in Canada. Just over 25,000 employed Canadians participated in the study, which focused on the work-life experiences of employed caregivers.

Most respondents were highly-educated managers and professionals who work for larger firms, and for whom money and job security are less likely to be issues. As such, the findings are relevant to employers interested in

recruiting, retaining and engaging knowledge workers, and they probably represent a best-case scenario of the work-caregiving relationship.

The data used in the report come from three sources:

- 1) 25,021 employees who responded to the survey (survey sample)
- 2) 7,966 of those employees who filled out the caregiver section (caregiver sample)
- 3) 111 caregiver employees who agreed to participate in a follow-up telephone interview (interview sample)



PREVALENCE OF EMPLOYED CAREGIVERS IN CANADA

Canadian employees in professional positions are delaying parenting and are more likely to have both older parents and younger children (i.e. to be part of the sandwich generation). Out of the 25,021 employees surveyed, 25% to 35% are balancing work, caregiving and/or childcare. Sixty percent of those in the caregiver sample are in the sandwich group.

The study found that the younger generation is more egalitarian about the division of household responsibilities, which means employers can expect to see more male employees in caregiving roles. Moreover, a decline in the size of Canadian families means there will be fewer family members to share caregiving responsibilities.

Implications and recommendations for employers

The high percentage of knowledge workers with caregiving responsibilities, particularly multi-generational caregiving responsibilities, reinforces the fact that Canadian companies must address the needs of these employees if they want to attract and retain talent in a seller's market. They will also have to move away from gender-based solutions, as an increasing number of male employees will be implicated in caregiving.

ELDERCARE SITUATIONS

The majority of employees in the caregiver sample feel responsible for the care of multiple family members in their seventies who live within an hour's drive of their home. Most have been caring for these dependents for five to 10 years. Eldercare can last for a prolonged period of time and caregiving demands often intensify as the dependent advances in age. The study also found that 90% of employees view caregiving as a family responsibility, and 83% choose to take on the responsibility.

Implications and recommendations for employers

The demands of caring for multiple family members make it more likely that employees will feel torn between their work and caregiving responsibilities; increasingly so as caregiving demands intensify as the dependent ages. This, and the fact that employees feel compelled to act as caregivers, suggests that employers should consider it a business imperative to implement flexible policies and practices to address their employees' diverse caregiving needs.



CAREGIVING ACTIVITIES

The most common caregiving activities are providing emotional support and helping with health and daily living (e.g. medical appointments, grocery shopping). Forty-two percent of the 7,966 employees in the caregiver sample said they find caregiving requires a moderate amount of energy, and one in five said it requires a high amount of energy. Most indicated that their employed partners help with the caregiving.

Implications and recommendations for employers

The fact that the employees' employed partners often help with caregiving indicates that the number of employees balancing work and caregiving is larger than the study's initial estimates. Employers should consider different approaches to address the most common caregiving activities: (1) Flexible work arrangements (many specifically asked for compressed work weeks) to address time-consuming health and daily living assistance, (2) expanded Employee Assistance Programs (EAPs) and Employee and Family Assistance Programs (EFAPs) to help employees cope with the need to provide emotionally-taxing support to aging family members, and (3) training to communicate the importance of this issue to management.

BALANCING WORK AND CAREGIVING

Forty percent of the 25,021 employees in the survey sample reported high levels of overload both at work and at home. Employees in the sandwich group reported the highest levels of overload overall. Employees in the caregiver sample stated that they cope with conflict between work and caregiving by bringing work home and giving up on sleep, personal time and social life — strategies that put them at higher risk of experiencing burnout and stress. Eighty percent of the employees interviewed said they find caregiving overwhelming. One in three find it so on a daily basis. Forty percent said they feel angry and frustrated by all the demands on their time. Of concern are the data showing that these frustrations often negatively affect how they interact with colleagues and clients at work. The study also found that the amount of emotional strain caregivers experience is a much more important predictor of employee well-being and their performance at work than either the amount of time they spend in eldercare or the type of care they provide.

Implications and recommendations for employers

Employers should introduce EFAPs and seminars to help employees manage the emotional aspects of caregiving, and consider lobbying for, or taking responsibility for, local community centres that offer programs for seniors. If employers offer support for daycare, they should also consider offering support for eldercare.



CAREGIVING NEGATIVELY IMPACTS CAREGIVERS' MENTAL AND PHYSICAL HEALTH

Dependent care, regardless of type, is associated with a decline in employees' perceived health – with employees in the sandwich group reporting the lowest levels of perceived health and the highest levels of stress and depressed mood overall. Eighty-three percent of the interview respondents said they have experienced physical consequences from caregiving, the most common being exhaustion and tiredness. One in three survey respondents said caregiving has substantially reduced their energy levels and the amount of sleep and downtime they get. The study also found that very few employers provide support for caregiving.

Implications and recommendations for employers

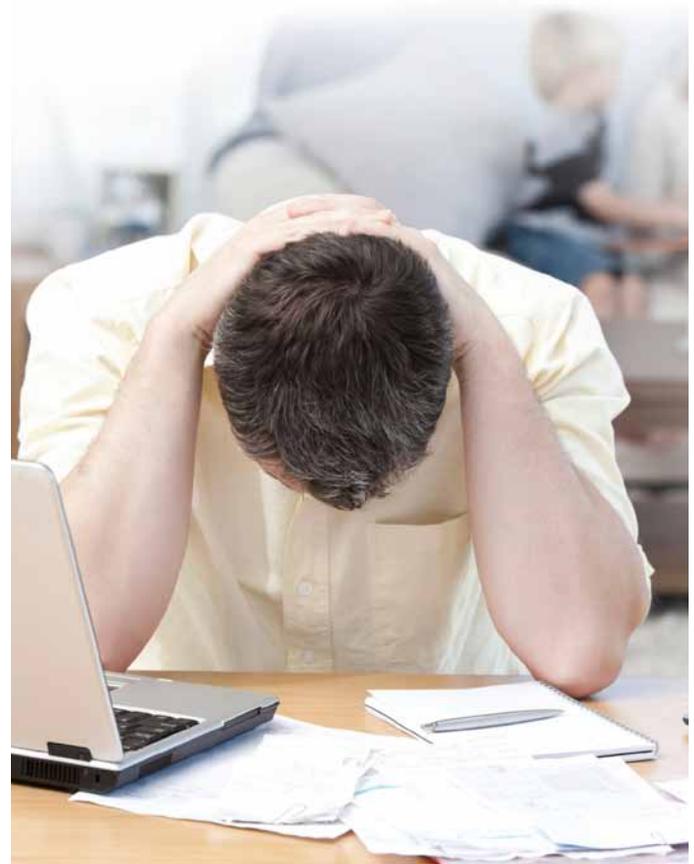
These findings reinforce the position that employers have to address the needs of caregiving employees, especially those in the sandwich group. Again, flexible working hours and leaves of absence, EAPs/EFAPs and communicating to management and staff that caregiving is a legitimate work issue are some ways of addressing this situation. However, introducing these policies alone is unlikely to make much of a difference unless they are implemented in a fair and transparent manner and linked to managers' performance pay to ensure their use does not depend on job type or who one reports to.

CONFLICT BETWEEN WORK AND CAREGIVING NEGATIVELY IMPACTS THE BOTTOM LINE

Sixty percent of the employees interviewed said their caregiving situation has negatively impacted their productivity and/or their career. Greater details on this phenomenon were obtained by looking at the experiences data of the 7,966 employees with caregiving responsibilities. This analysis determined that balancing work and caregiving has contributed to a moderate/substantial increase in the likelihood that employees will be absent, use company benefits and turn down a promotion; and a moderate/substantial decrease in their productivity and the number of hours they can devote to work. Also relevant are data showing that a majority of the caregivers in the interview sample found that skills they have learned as a caregiver also help them deal more empathically, diplomatically and patiently with colleagues and clients at work. Similarly, the project and crisis management skills they have acquired at work help them in their caregiving role.

Implications and recommendations for employers

Employers can use the study data to demonstrate how their organization's bottom line will be impacted if the needs of their caregiving employees are not addressed. Consequences include increased absenteeism and use of benefits, challenges in succession planning, reduced client satisfaction, lower productivity and increased conflict within the work group. Employers need to address the challenges caregivers face by offering compassionate care leave, paid and unpaid leaves of absence, and by setting up caregiver support networks in the workplace. The study also showed that providing crisis and project management training not only results in more skilled employees, it also helps caregivers manage their situation outside of work.



GENDER DIFFERENCES

Women are more likely than men to be caregivers. They are twice as likely to be in the sandwich generation and three times as likely to be in the eldercare-only group. Female employees are also more likely to find the role of caregiver very demanding and to be negatively affected by it. Men, particularly those in Generation X, are also experiencing serious challenges balancing work and caregiving. They are more likely to be absent from work due to mental and emotional fatigue than any other group of employees, and they report higher levels of 'work interferes with family'. There were no gender differences in perceived physical health and work overload, or in the extent to which caregivers find caregiving negatively impacts their productivity or the number of hours they spend at work.

Implications and recommendations for employers

Both male and female employees are experiencing serious challenges maintaining a good work-life balance, which reinforces the position that employers need to implement policies and practices to support all employees, not just female caregivers.



EMPLOYEES WITH MULTI-GENERATIONAL CAREGIVING RESPONSIBILITIES ARE STRUGGLING

Employees in the sandwich group were evenly split between Generation X and baby boomers. Those in the sandwich group were more likely to say money is tight in their family, indicating that eldercare is more likely to be a financial strain on families who have children still living at home. The sandwich group engages in a wider range of caregiving activities and faces more challenges than their counterparts with only one caregiving role. They reported the highest levels of work, family and total overload; the highest levels of stress and depressed mood; the highest incidence of both 'work interferes with family' and 'family interferes with work'; and the poorest perceived physical health. The sandwich group is also more likely to be absent from work, turn down a promotion and say that work-life balance has negatively impacted their productivity at work and increased their use of company benefits. However, they were more likely to report positive spill-over between their work role and their role as caregiver.

Implications and recommendations for employers

Employees in the sandwich generation are getting worn down by the demands on their time and they lack the emotional resilience to separate the work-life domains. The fact that most think their employers do not acknowledge that this as an issue exacerbates the situation as many try to cope by meeting work and family responsibilities at their own expense (i.e. neglecting their own physical and mental health). These findings are a wake-up call for employers given that the proportion of Canada's workforce with multi-generational caregiving demands is likely to increase in the next decade as our population ages, people live longer and employees tend to have their children in their thirties. The fact that the employees in the sandwich group were evenly split between Generation X and baby boomers helps dispel the myth that older employees are the ones most likely to be caregivers. These findings reinforce the fact that employers have to address this issue if they want to remain competitive.

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