

Study on Eldercare Issues in Canadian Organizations

Summary and Key Findings

Linda Duxbury, PhD, Sprott School of Business, Carleton University

Maggie Stevenson, PhD, Sprott School of Business, Carleton University

Introduction

“Population aging – the increase of the share of older individuals in a society due to fertility declines and rising life expectancy – is an irreversible global trend with far-reaching economic and socio-political consequences” (Nikolova, 2016, p.1). Projections by the U.S. Census Bureau (He, Goodkind, & Kowal, 2016) show that the growth rate of those aged 65 or over will increase dramatically in the next several years, a phenomenon they attribute to high fertility levels after the second world war, the subsequent reductions in fertility due to changing social norms and the ready availability of reliable birth control, and improvements in health that increases life expectancy. These demographic trends are likely to increase the number of employees who are required to balance work and caregiving.

A caregiver is an individual who provides ongoing and unpaid support to at least one elderly family member or friend (Duxbury, Higgins, & Smart, 2011). The role of caregiver is often demanding and unpredictable, involving the diversion of time, energy, and financial resources from caregivers’ normal activities sometimes with little notice and/or at inconvenient times (Pavalko & Gong, 2005). Demographic data from the US, Canada, and the European Union indicate that the number of employed caregivers is substantive and growing (Calvano & Dixon, 2015; Sinha, 2013). Population aging combined with delayed marriage and childbearing (Duxbury & Higgins, 2017) have also resulted in a rise in the number of employees in the sandwich generation (i.e. employees providing care for elderly relatives and children).

Although the demographic data are compelling, recent research by Duxbury and Higgins (2017) determined that of the 3300 Canadian employees they surveyed only 3% indicated that they worked for an organization that had implemented eldercare referral services while 12% worked for an organizational that had formal policies in place that address issues associated with caregiving. These data are similar to findings from a similar survey of 25,000 Canadians in 2016. Given today’s realities with respect to population aging, why is it that companies are not paying attention to issues associated with the need to balance work and caregiving? Why the absence of support for the substantive portion of their workforce who face these types of challenges? Are employers simply unaware of the demographic shifts in terms of caregiving? Do they think that the family friendly policies that they have put in place to help parents balance work and childcare will also help employees engaged in eldercare? Are they unaware of what kinds of supports need to be in place to help male and female workers with such demands? Has the business case for change not been made in this area? Do companies feel that by putting such supports in place when

their competitors have not will put them at a competitive disadvantage in the workplace. Or is it all of the above. The study that is presented in this paper seeks answers to these questions.¹

Methodology

The methodology we used to conduct this study is based on Lewin's (1947) study of planned change. According to Lewin (1947) organizations need a compelling reason to change. He argued that most organizations and people are "frozen" in terms of openness or readiness to change and theorized that all permanent change progresses through three successive levels of change: (1) unfreezing the present level, (2) moving to the desired state, and (3) refreezing the changed system. Many regard Lewin's work on change as the foundation of change management and his research continues to influence change theory and practice to this day (Cummings, Bridgman & Brown, 2016). According to Lewin (1947), to change a system one begins by mapping out its "field" – the totality and complexity of the active forces that at any given time produce the system's environment (Burnes, 2004). Lewin (1946) defined two types of active forces: (1) forces driving change, and (2) restraining forces or barriers to change. He also developed a diagnostic tool, the force field analysis model, to aid the "field" mapping process. This tool helps the researcher create a visual display of the forces driving and restraining a planned change and determine how best to introduce needed change.

In this study, the data needed to construct a force field diagram describing the forces encouraging and dissuading employers from implementing policies and programs supporting employed caregivers was collected using the Delphi Method (Linstone & Turoff, 2002) a structured communication technique which relies on a panel of experts. Our partner in this research, the Conference Board of Canada, helped us solicit a sample of human resource experts from their membership by sending out a letter explaining the study and asking people to volunteer to participate in the research. This letter was sent to members of the following Conference Board of Canada councils:

- The Council of HR Executives (two groups – East and West)
- The Council on Workplace Health and Wellness (CWHW)

Sixty-seven HR executives working for 60 of Canada's largest firms agreed to participate in the Delphi study process. These individuals work in approximately equal numbers for private sector, public sector and greater public sector/NFP sector organizations. The companies that they represented can be found in every province in Canada.

The Delphi method is a problem-solving technique where answers to a question are determined by sending multiple rounds of questionnaires to a group of experts. Key to this technique is the fact that anonymous responses are aggregated and shared with the group after each round. We followed a modified version of the Delphi methodology outlined in Linstone and Turoff (2002) and Lewin (1947): solicit ideas, rate ideas, rate ideas, undertake final review and provide feedback. A general

¹ This study was funded through SSHRC/CIHR Partnership Grant FRN: HWP – 146001 (CIHR); 890-2016-3018 (SSHRC) entitled: "Mobilizing a Caregiver-Friendly Workplace Standard: A Partnership Approach."

description of how the Delphi process unfolded in this study is provided in this section of the paper. Full details are provided below.

We began (Delphi Round One) by interviewing our panel of experts with the goal of identifying the key forces driving organizations to introduce changes to their policies and practices that are supportive of work-caregiving issues as well as the key barriers impeding progress in this area. This was followed by two rounds of “rate ideas” questionnaires in which we shared the results from the previous round of data collection with the experts. After each round, the researchers (i.e. Duxbury and Stevenson) provided an anonymized summary of the experts' opinions from the previous round as well as the reasons they provided for their judgments. Consensus on the key forces for and against change was achieved after two rounds of surveying. We concluded the process by following the advice of Lewin and asking our experts to identify how any of the key barriers to change identified in this research could be reduced.

The Delphi Study: Round One

The *first round* of the Delphi study involved a short interview with organizational leaders in which informants were asked to identify factors that would:

- encourage your organization/other organizations such as yours to introduce policies and programs to support employees who are balancing work commitments with eldercare demands (i.e. drivers of change).
- discourage your organization/other organizations such as yours to introduce policies and programs to support employees who are balancing work commitments with eldercare demands (i.e. barriers of change)

Results from this phase of the study were used to develop a survey that listed all drivers and barriers to change identified by the organizational leaders participating in this study.

Sixty-seven senior executives representing 60 of Canada’s largest employees took part in this step of the research process. The sample was well distributed with respect to sector with 37% of the executives representing private sector firms, 30% worked in the public sector (federal, provincial, municipal), and 30% were employed by the not-for-profit sector (health care, education, other not-for-profit) organizations

Respondents identified 26 forces for change. All but five of these forces were internal to their organizations. The extraneous five were external forces for change. The forces for change were grouped into the following four buckets:

- *Demographic factors* (e.g. female dominated workforce; Employee Assistance Program (EAP) statistics; average age of our workforce): n = 5
- *Organizational factors* (e.g. evidence that eldercare negatively impacts productivity; support for eldercare is consistent with our company’s focus on employee wellbeing; our desire to be a role model): n = 10
- *Commitment to employee wellbeing* (e.g. our competitors have introduced policies in this area; we believe it is the right thing to do; this is something we need to do to maintain our competitive edge with respect to recruiting talent): n = 6

- *External forces for change* (e.g. the government is not doing enough so we need to step up; government legislation requires it): n = 5

Respondents also identified 33 barriers to change. All but one of these barriers (support for eldercare issues should come from the government) were internal to the organization. These barriers to change were classified into the following groups:

- *Demographic factors* (e.g. male dominated workforce; focus is on policies to support new hires not older employees): n= 5
- *Organizational factors* (e.g. we worry that employees will abuse such programs; our organizational culture values face time and 24/7 availability is not supportive of such programs; these types of programs would not be used in our organization; our leadership team resists the introduction of family-friendly programs; the pace of work makes it difficult for us to provide the type of flexibility that will make a difference): n = 18
- *Monetary factors* (e.g. the cost of introducing such programs is prohibitive and likely to have a negative impact on our bottom line; the business case for change in this area has not been made): n = 6
- *Capacity issues* (e.g. our company has too much on its plate already and does not have the time or energy to deal with less tangible HR issues; we do not have the capacity internally to allow employees to take time off to manage eldercare demands; our firm does not have the resources needed to work on this issue at this time): n = 4

The Delphi Study: Round Two

In the *second round* of the Delphi study key informants were asked to answer a questionnaire which was developed using the responses provided in round one. Respondents were presented with a comprehensive list of drivers (n = 26) and barriers (n = 33) to change with respect to addressing the issues associated with balancing work and eldercare responsibilities and were asked to indicate the extent to which each of these factors would encourage/discourage their organization or organizations such as the one they are working for from introducing programs and policies relating to eldercare and caregiving. Respondents were given a 7-point Likert scale ranging from “0 = not at all” to “6 = always” on which to record their responses.

Fifty-four (54) of the individuals who participated in the first phase of our study responded to the request to complete the questionnaire (81% response rate). One in three of the respondents worked in the private sector, 28% were from the public sector and 35% represented an organization in the NFP sector.

We examined the results from the submitted responses and eliminated forces and barriers to change that the majority of people in each industry sector felt were not relevant to the decision-making process with respect to addressing these issues. This analysis was used to create another survey listing the "most important" drivers (n = 15) and the "most important" barriers (n = 17) to changing business practices with regard to balancing work and eldercare.

The Delphi Study: Round Three

In the *third round* of the Delphi study, we asked our group of experts to examine this reduced list of drivers and barriers to change and to tell us how important they believed each of these drivers and barriers were to the decision-making process in their organization or organizations such as the one they are working for with respect to introducing programs and policies relating to eldercare and caregiving. They were provided with a 5-point Likert Scale on which to record their responses. The Round Three survey included the following two additional questions:

“Please indicate, in the boxes below, the three most important drivers to your organization's decision-making process with respect to introducing policies and programs to support employees balancing work and eldercare demand.”

“Please indicate, in the boxes below, the three most important barriers to your organization's decision-making process with respect to introducing policies and programs to support employees balancing work and eldercare demand.”

Fifty-one out of 54 respondents (94% response rate) submitted this survey: 33% from the private sector, 27% from the public sector, and 40% from the NFP sector². All but two responded to the final question of the survey asking respondents to indicate the three most important drivers/barriers to change.

The full list of forces (Appendix 1) and barriers (Appendix 2) that were included in the Phase 3 survey are included in the Appendix of this report. Included in these Appendix are the mean response scores to each of the items included in the Phase 3 survey. In both cases, forces for change and barriers to change are listed in descending order from most important to least important. In the section below we outline key findings with respect to the top three most important drivers and barriers of change identified by respondents.

Most Important Drivers of Change

Using the responses to our question asking respondents to identify the first, second, and third most important **drivers** of change with respect to addressing the issues associated with balancing work and eldercare responsibilities, we calculated an importance score for each of the 15 listed drivers of change. Each driver of change was then ranked by the importance score, highest to lowest.

In Table 1 we list the top three drivers of change ranked for the whole respondent population regardless of industry sector. This is followed by a second table (Table 2) showing the importance rankings of the drivers of change by industry sector.

² It should be noted that we sent the Stage 3 survey to all 67 of the respondents on our original list. While we assume that the people who filled in the Stage 3 survey are the same ones who filled out the Stage 2 survey, we cannot know this with certainty. We can, however, be sure that three-quarters (76%) of the 67 people who participated in Stage 1 of the research completed the Stage 3 survey.

Table 1: Drivers of Change Regardless of Industry Sector

<i>Importance Ranking</i>	<i>Drivers of Change</i>
1	Support for eldercare is consistent with our companies focus on employee well-being.
2	To maintain our competitive edge, we need to attract top talent. In today's tight labour market, this means that we need to offer employees flexibility and programs with respect to balancing work and eldercare.
3	To maintain our competitive edge, we need to retain top talent. In today's tight labour market, this means that we need to offer employees flexibility and programs with respect to balancing work and eldercare.

What are the main reasons companies are considering introducing policies and programs to address issues associated with work and eldercare?: This study identified three important set of drivers of change with respect to the introduction of policies and programs to support balancing work and eldercare:

- Support for eldercare is consistent with the values of the firm (to care for employees) and the firm’s focus on wellbeing.
- For competitive reasons (respondents link the ability to recruit, retain and engage talent to the provision of programs that will help employees balance work and family).
- It is a demographic imperative (population aging makes it likely that their employees will need to engage in caregiving).

Table 2: Drivers of Change by Industry Sector

<i>Driver of Change</i>	<i>Importance Ranking</i>		
	<i>Private</i>	<i>Public</i>	<i>Greater Public/NFP</i>
Support for eldercare is consistent with our companies focus on employee well-being.	1	1	1
To maintain our competitive edge, we need to retain top talent. In today's tight labour market, this means that we need to offer employees flexibility and programs with respect to balancing work and eldercare.	2	3	
To maintain our competitive edge, we need to attract top talent. In today's tight labour market, this means that we need to offer employees flexibility and programs with respect to balancing work and eldercare.			1
There is evidence that eldercare issues negatively impact employee mental health.	3		
Our desire to adopt the 'National Standard for Psychological Health & Safety in the Workplace'.		2	
Population aging makes it more likely that our employees will have to care for one or more aging parents, and we wish to support them in their efforts.			1

Most Important Barriers to Change

Using the responses to our question asking respondents to identify the first, second, and third most important barriers to change with respect to addressing the issues associated with balancing work and eldercare responsibilities, we calculated an importance score for each of the 17 listed barriers to change. Each barrier to change was then ranked by the importance score, highest to lowest.

In Table 3 we present the top three ranked barriers to change calculated using the data from all respondents regardless of industry sector. This is followed in Table 4 with the results of our analysis showing the importance rankings of the barriers of change by industry sector.

Table 3: Barriers to Change Regardless of Industry Sector

<i>Importance Ranking</i>	<i>Barriers to Change</i>
1	The business case for change in this area has not yet been made.
2	The pace of work makes it difficult for us to provide the type of flexibility that will make a difference.
3	Our employees have not asked us to introduce policies and programs to support balancing work and eldercare demands.

Table 4: Barriers to Change by Industry Sector

<i>Barriers to Change</i>	<i>Importance Ranking</i>		
	<i>Private</i>	<i>Public</i>	<i>Greater Public/NFP</i>
The business case for change in this area has not yet been made.	3	3	2
The pace of work makes it difficult for us to provide the type of flexibility that will make a difference.	1		3
We do not know where to start with respect to addressing this issue (i.e., what is best practice, what programs are needed, who would benefit from such programs).	3		
Balancing work and eldercare lack visibility as an issue that needs to be addressed.	1		
Our firm does not have the resources (people, time) needed to work on this issue at this time.		1	
The cost of introducing such programs is prohibitive and likely to have a negative impact on our bottom line.		2	
Our employees have not asked us to introduce policies and programs to support balancing work and eldercare demands.			1

What are the main barriers to the introduction of policies and programs to address issues associated with work and eldercare?: Data from this study implicates the following key barriers to change with respect to the introduction of policies and programs designed to help employees balance work and eldercare:

- addressing issues associated with eldercare are not seen as a priority at this time,
- employees perceive that the costs of addressing this issue outweigh the benefits that they will realize, and
- firms do not want to incur the financial costs that they see go hand in hand with addressing issues associated with work and eldercare.

It should also be noted that there is more sectorial diversity with respect to the barriers to addressing issues associated with balancing work and eldercare than in the forces for change.

The Delphi Study: Round Four

After completing the traditional stages associated with a Delphi study, we undertook one final step to help companies determine how to best reduce the barriers identified in phase 3 of our analysis. To do this we sent a note around to one informant at each of the 60 organizations on the list originally given us by the Conference Board of Canada. Included in this note was the list of top three barriers to change for their sector and a request for them to participate in one final interview where we would talk about how these key barriers to change could be reduced. Thirty-two (32) HR executives of the 60 organizations who participated in the first phase of our study responded to this final request (53% response rate). One in three of the respondents worked in the private sector, 28% were from the public sector and 35% represented an organization in the NFP sector.

During the interview we asked respondents to choose one or two of the barriers to change from the list of 17 we sent them in advance (see Appendix 2) and to provide us with their ideas on how these barriers could be overcome. We also told them that the ideas they provided could relate to how interested organizations, researchers, governments, or other policy makers could do to address these barriers.

Respondents identified 41 ideas for overcoming barriers to change. A plurality (n = 19; 46%) of these suggestions were targeted at what organizations could do to address these issues, while 15 (37%) ideas focussed on potential government actions and six (15%) ideas were suggested for researchers.

Overall, 10 out of 17 (59%) of the barriers to change on our list were selected by our 32 respondents for discussion in this part of the interview. Some respondents picked more than one barrier to discuss. Sixty percent (n = 19) of the respondents provided suggestions with respect to how they felt key stakeholders could address the only barrier to change that was evaluated as being one of the three most important obstructions to address work-caregiving issues in all three sectors: “The business case for change in this area has not yet been made.” Many of these individuals noted that they felt that most of the other important barriers to introducing changes at the organizational level that would facilitate issues relating to balancing work and caregiving were “closely linked” to this key barrier and if it could be reduced progress in this area was more likely. One in four (n = 8) provided suggestions with respect to another barrier that appeared in our “top three barriers” list

and was evaluated as the most critical barrier to change by those in the public sector sample: “Our firm does not have the resources needed to work on this issue.” The only other barrier addressed by a substantive number of our informants (16% of the sample or n = 5) “Our employees have not asked us to introduce such policies and programs” was the identified as the number one barrier to change by those in the NFP sector. It should be noted that our analysis determined that the recommendations did not appear to be barrier specific (i.e. people recommended surveys be used to make the business case for change and determine the need for such programs) we have elected to focus our discussion on findings obtained with the total sample.

The full list of the ideas suggested by respondents are included in Appendix 3, 4 & 5. In the sections below we identify the key findings with respect to the ideas presented for organizations, government, and researchers.

What Can Organizations do to Overcome Barriers to Change?

The 19 ideas suggested by respondents for organisations trying to overcome barriers to change with respect to introducing eldercare policies and programs were classified into the six themes shown in Table 5. Details on each of these themes are presented below. More specific information (i.e. themes, subthemes, responses by sector) can be found in Appendix 3.

Table 5: Ideas on how organizations can overcome barriers to change

	Total (n=32)	
	#	%
Develop a strategy to address work and eldercare issues through continual assessment and measurement	19	59
Facilitate and encourage open communication to inform and interact with employees on issues associated with caregiving	15	47
Educate new and existing managers/leaders /HR regarding the importance of this issue and how to handle it	10	31
Use external resources to make the case for change and inform senior leadership on the types of changes that are needed	10	31
Assess costs and benefits of policies and programs to support eldercare	6	19
Review and revamp existing benefits	6	19

Develop a strategy through continual assessment and measurement: Nineteen respondents felt that barriers could be reduced if organizations used data from surveys to develop a strategy to address issues relating to caregiving. All recommendations included in this theme spoke to the idea of measurement, albeit in somewhat different ways. Some respondents suggested that organizations needed to conduct robust and confidential employee surveys to establish base line data on the extent to which eldercare issues are contributing to work-life balance concerns. Others felt that specific details on the types of problems existing employees face with respect to this issue needed to be collected – perhaps through the use of focus groups or employee round tables. Others referred to the need to obtain data on demographic trends both inside and outside the organization.

Such data could be used internally to make the case that the organization either has, or is likely to have, employees that are struggling to manage eldercare issues. A few informants spoke about the need to measure the success and use of the programs currently in place to support employees and use these data as well as feedback from EAP programs to make the case for change. They recommended that performance expectations would be part of this evaluation process. Finally, respondents also felt that discussions relating to eldercare by business resource groups would help organizations leverage each other's knowledge and awareness of the challenges eldercare poses to employees and businesses.

Facilitate open communication to inform and interact with employees on issues associated with caregiving: Fifteen respondents felt that barriers could be reduced if organizations implemented mechanisms which would facilitate communication between the employee and employer with respect to caregiving. Suggestions included in this theme include the following: (1) educate employees on their rights in terms of support and make sure that they understand that the organization is willing to address any concerns they have about eldercare programs; (2) create a psychologically safe workplace by creating opportunities for employees to talk about eldercare issues; and (3) include eldercare in discussions of mental health and work-life balance. Respondents who gave these types of response all felt that an increased awareness of the link between eldercare and stress would help reduce the stigma of taking time off work to care for an elderly dependent.

Educate new and existing managers/leaders/HR regarding the importance of this issue and how to handle it: Ten informants felt that education was key to the reduction of the organizational barriers identified in this study. They suggested that these education efforts be focused on three groups – managers, organizational leaders, those in HR – and cover the following topics: (1) organizational programs and policies in this area, (2) how to recognize when an employee may need support because of eldercare responsibilities, (3) how to connect with employees in a non-threatening way when discussing eldercare.

Use external resources to make the case for change and inform senior leadership on the types of changes that are needed: Ten of the senior leaders we interviewed recommended that organizations seek help from external resources to reduce the barriers to addressing issues associated with balancing work and eldercare. More specifically, they recommended that organizations network with other organizations in their sector and seek help from consulting firms or public policy forums.

Assess costs and benefits of policies and programs to support eldercare: Six of our respondents felt that organizations needed to undertake a cost benefit analysis of the various policies and programs that might support employees with caregiving demands. They felt that barriers could be reduced if organizations: (1) Looked at ways to prove value down the road from the productivity benefits of supporting someone with eldercare issues, and (2) Link initiatives to support eldercare to strategic priorities.

Review and revamp existing benefits: Six respondents recommended that rather than reinventing the wheel, organizations look at their current suite of family-friendly policies and practices to determine if they could be modified to help employees balance work and caregiving.

They felt that such a strategy would be more likely to be cost neutral, thereby reducing barriers associated with costs. Specific suggestions included in this theme involve including eldercare in definitions of family leave, looking for ways to add flexibility to a role such as greater use of technology, implementing a basket of flexible work arrangement options, and evolving the work environment away from the 40hr/week model to something less traditional.

What Can Government do to Overcome Barriers to Change?

Twenty-six (81%) out of the 32 respondents who participated in the Stage Four interview process suggested 15 different ways that the government could help overcome barriers preventing the introduction of policies and programs to address issues associated with work and eldercare. These 15 ideas were classified into the five themes shown in Table 6. Details on each of these themes are presented below. More specific information (i.e. themes, subthemes, responses by sector) can be found in Appendix 4.

Table 6: Ideas on how governments can overcome barriers to change

	Total (n=32)	
	#	%
Educate the public and organizations	14	44
Introduce specific legislation to support issues associated with eldercare	13	41
Extend and improve existing policies and programs	8	25
Make it a policy priority	2	6
Support more focused research by the government	2	6

Educate the public and organizations: Fourteen respondents wanted the government to take the lead with respect to public education regarding issues surrounding eldercare. More specifically, they wanted governments to “Change the narrative and promote the conversation.” They wanted governments to use the data that they have to make the case for organizations to recognize that eldercare is an important driver of need for family leave. They gave governments efforts to educate organizations on the need for domestic violence leave as an example of the approach they wanted taken. They also felt that governments could help “demystify the process of looking for eldercare resources” and provide social care coordinators who could help employees navigate what they felt was an overly complex system. Finally, they also wanted the government to help educate employers on building a culture where employees feel safe.

Introduce specific legislation to support issues associated with eldercare: Thirteen respondents wanted the government to introduce specific legislation to support issues associated with eldercare. They felt that such legislation would level the playing field as it would require all organizations to take action. Respondents suggested a number of types of legislation that they felt would be helpful including: (1) financial support or tax relief for long term employed eldercare support including transport, (2) protected leave of absence, (3) paid short leave of absence so that

the employee could explore eldercare options, (4) end of life policy, and (5) something similar to the parental sharing benefit (childcare) or parental leave for eldercare.

Extend and improve existing policies and programs: Eight respondents wanted the government to either improve existing programs and/or build on them so that they would include employed caregivers. Suggestions on programs that they wanted to see improved/expanded included the length of family/compassionate leave, EI, senior benefits plans. They also wanted the government to provide funding for the real costs associated with eldercare benefits (not just give a percentage) and take the lead in improving eldercare facilities and making them more affordable (a policy that in the hindsight of COVID is well overdue).

Other Suggestions for government. Respondents made other suggestions that were directed to governments including: (1) Make eldercare a policy priority across education, social services, and health care ministries, and (2) Support more focused government research in this domain (e.g., more data from Stats Canada measuring the extent of the employed eldercare issue).

What can Researchers do to Overcome Barriers to Change?

Many respondents (21 out of the 32 interviewed) also made suggestions during the Phase Four interviews about what researchers could do to help overcome the barriers to change identified in this study. The 16 ideas they offered were classified into the six themes shown in Table 7. Details on each of these themes are presented below and provided in Appendix 5.

Table 7: Ideas on how researchers can help organizations overcome barriers to change

	Total (n=32)	
	#	%
Make practical outcomes of research available e.g. publicly available resource kit of strategies & implementation; sharing ideas/research with other organizations; case studies & examples.	9	28
What impact does eldercare and stress have on employees e.g. employability or ability to do job?	6	19
What are other organizations doing – how do we compare – are we on the right track?	4	13
What works, what doesn't? What might have best impact?	4	13
Provide a better understanding of the link between home & work life for employees	3	10
What alternative approaches are other countries using e.g. link eldercare and student needs; look at northern Europe	2	6

Over a quarter (9) of those interviewed in this final phase of the study sought practical outcomes coming from this and other research. The search for workable solutions seemed to be a common thread amongst many of the suggestions for researchers. Another idea put forward suggests looking outside of Canada for alternative approaches whilst two more of the proposed specific

research questions, albeit only put forward by four (4) respondents each, also sought the examination and evaluation of practical solutions. The list of suggestions in Table 7 offer interested researchers a very concrete list of research ideas on how they can participate in advancing issues associated with work and eldercare moving forward.

Summary

What are the main ideas for dealing with the key barriers to the introduction of policies and programs to address issues associated with work and eldercare? Data from this final phase of our Delphi study suggest the following:

- Organizations need to move forward with respect to dealing this issue, but they also need to ensure that any policies and programs that are introduced include a measurement component and are balanced in their approach.
- Practical advice on how to build the business case for change is urgently needed by organizations. This advice needs to be based on data and include information on both the costs and benefits of dealing with balancing work and caregiving as well as the costs of ignoring work and eldercare as an issue that needs to be addressed.
- Communication internally by organizations and externally by the government and other policy makers emphasizing the legitimacy of eldercare as an issue that needs to be recognized and addressed is viewed as important
- Seeking best practices and workable solutions from others is viewed as an important way to move forward
- The role of government is seen as key to overcoming organizational barriers to change.
- Most of the suggestions provided by our informants with respect to the types of research that needed to be done to move this issue forward focus directly or indirectly on assessing and/or finding practical solutions to the challenges faced by employees who are also engaged in caregiving.

References

- Burnes, B. (2004). Kurt Lewin and the planned approach to change: A re-appraisal. *Journal of Management Studies*, 41, 977-1002.
- Calvano, L., & Dixon, J. (2015). Eldercare and work. *Encyclopedia of geropsychology*. New York, NY: Springer.
- Cummings, S., Bridgman, T., and Brown, K. G. (2016). Unfreezing change as three steps: Rethinking Kurt Lewin's legacy for change management. *Human Relations*, 69, 33-60.
- Duxbury, L. and Higgins, C. (2017). *Something's Got To Give: Balancing Work, Childcare, and Eldercare*, University of Toronto Press: Toronto
- Duxbury, L., Higgins, C., & Smart, R. (2011). Elder care and the impact of caregiver strain on the health of employed caregivers. *Work*, 40(1), 29-40.
- He, W., Goodkind, D. and Kowal, P. (2016). *An Aging World: 2015*, United States Census Bureau, International Population Reports, P95/16-1, U.S. Government Publishing Office, Washington, DC.
- Lewin, K. (1947). Frontiers in group dynamics. In D. Cartwright, Ed., *Field theory in social science: Selected theoretical papers*. London, UK: Harper & Row, 188-237.
- Linstone, H. A., & Turoff, M. (2002). *The Delphi method: Techniques and applications* (Vol. 18). Addison-Wesley Publishing Company, Advanced Book Program.
- Nikolova, M. (2016). Two solutions to the challenges of population aging. *Up Front*, Retrieved January 30, 2018 from: <https://www.brookings.edu/blog/up-front/2016/05/02/two-solutions-to-the-challenges-of-population-aging/>
- Pavalko, E., & Gong, F. (2005). Work and family issues for midlife women and their families. In S. Bianchi, L. Casper, K. Christensen, & R. King. (Eds.) *Work, Family, Health and Well-Being*, (pp 375-392), Mahwah, NJ: Lawrence Erlbaum.
- Sinha, M. (2013). *Portrait of caregivers*, 2012. Ottawa: Statistics Canada.\
- Statistics Canada (2012). General Social Survey – Family (GSS). Retrieved From: <http://www.statcan.gc.ca/pub/89f0115x/89f0115x2013001-eng.htm>

Appendix 1 – Forces for Change

List of forces that may drive organizations to consider implementing policies and programs to support employees who are trying to balance work and eldercare demands as presented in the phase 3 survey.

Driver for change	Mean (SD)
Support for eldercare is consistent with our companies focus on employee well-being.	4.2 (0.73)
Support for eldercare is consistent with our company values to take care of our people.	4.0 (0.84)
To maintain our competitive edge, we need to <i>retain</i> top talent. In today's tight labour market, this means that we need to offer employees flexibility and programs with respect to balancing work and eldercare.	3.9 (0.82)
Population aging makes it more likely that our employees will have to care for one or more aging parents and we wish to support them in their efforts	3.9 (0.86)
The average age of our employees (i.e., in their mid 40s) means they are likely to be in the sandwich generation (i.e., care for both elderly parents and children).	3.8 (0.94)
There is evidence that eldercare issues negatively impact employee mental health.	3.8 (0.96)
We believe that organizational support for eldercare issues will enhance employee engagement.	3.8 (0.94)
We believe that this is the right thing to do. Organizations need to help their employees cope with the challenges inherent in eldercare.	3.8 (0.88)
To maintain our competitive edge, we need to <i>attract</i> top talent. In today's tight labour market, this means that we need to offer employees flexibility and programs with respect to balancing work and eldercare.	3.7 (1.11)
The desire to be considered an employer of choice.	3.7 (0.96)
We believe that organizational support for eldercare issues will lead to greater employee productivity (i.e., reduce distractions when at work, help them focus).	3.7 (0.92)
The number of employees who seek help from our EAP services to help them cope with stress is increasing.	3.6 (0.95)
The need to support our employees at all stages of their career and throughout their life-cycle. It is inequitable to provide support to parents but not to those with eldercare.	3.5 (1.10)
We believe that organizational support for eldercare issues will encourage employees to return to work after a leave of absence for eldercare issues.	3.5 (1.20)
Our desire to adopt the 'National Standard for Psychological Health & Safety in the Workplace'.	3.4 (1.07)

Appendix 2 – Barriers to Change – List of factors that may stop companies from introducing policies and programs to support employees who are balancing work commitments with eldercare demands as presented in the phase 3 survey. Presented in descending order – from most important barriers to the least important barriers.

Barrier to change	Mean (SD)
The business case for change in this area has not yet been made.	3.1 (1.27)
Our employees have not asked us to introduce policies and programs to support balancing work and eldercare demands.	2.9 (1.32)
Addressing this issue is not a priority for us at this time.	2.8 (1.19)
We do not have the types of internal information that we need to make the business case for change (e.g., while more people seek support from EAP for stress, we do not know why stress is increasing).	2.7 (1.33)
Our firm does not have the resources (people, time) needed to work on this issue at this time.	2.6 (1.02)
Balancing work and eldercare lacks visibility as an issue that needs to be addressed.	2.5 (1.03)
The cost of introducing such programs is prohibitive and likely to have a negative impact on our bottom line.	2.5 (0.88)
It is costly to provide the types of flexibility employees want to manage their eldercare demands (e.g., teleworking, work from home)	2.4 (0.94)
We do not have the capacity internally to allow employees to take time off work to manage eldercare demands.	2.4 (0.98)
We do not know where to start with respect to addressing this issue (i.e., what is best practice, what programs are needed, who would benefit from such programs).	2.4 (1.09)
The pace of work makes it difficult for us to provide the type of flexibility that will make a difference	2.4 (0.96)
Balancing work and eldercare is not an issue for employees in our organization.	2.2 (1.14)
It would be very difficult to successfully implement the types of eldercare programs that would make a difference in our organization as our managers are not used to managing a flexible workforce.	2.2 (1.06)
Our company has too much on its plate already and does not have the time or energy to deal with less tangible HR issues.	2.1 (0.95)
There is no evidence that our employees face challenges balancing work and eldercare demands.	2.1 (1.11)
Our shareholders do not support the introduction of costly programs addressing issues around balancing and eldercare.	2.1 (1.04)
These types of programs would not be used in our organization (i.e., employees who take time off for eldercare issues would be stigmatized and viewed as less committed to the organization)	1.8 (1.11)

Note: Social bias means that respondents are likely to under-report their level of agreement with each of these factors.

Appendix 3 – What can Organizations do to Overcome Barriers to Change: By Sector

	Total (n=32)		Private (n=10)		Public (n=11)		Not for Profit (n=11)	
	#	%	#	%	#	%	#	%
Develop a strategy to address work and eldercare issues through continual assessment and measurement	19	59	7	70	6	55	6	55
Use/expand surveys; ensure they are robust and confidential.	8	25	2	20	2	18	4	36
Establish base line data for existing employees on the extent and specifics of eldercare issues and other work-life balance issues faced.	6	19	1	10	3	27	2	18
Use focus groups, employee roundtables, or business resource groups to leverage each other's knowledge	5	16	3	30	2	18	0	0
Measure demographic trends both internally & externally - what would be the data to support that we have employees that are struggling to manage eldercare issues.	4	13	2	20	1	9	1	9
Anticipate needs then gradually and rigorously validate the anticipations. Include a process & follow up procedures to confirm initial & ongoing support need and that performance expectations are being met	4	13	4	40	0	0	0	0
Measure success/use of current programs – include feedback from EAP programs.	3	9	2	20	1	9	0	0
Facilitate and encourage open communication to inform and interact with employees on issues associated with caregiving	15	47	4	40	4	36	7	64
Educate employees on what they have a right to, to ensure they understand the organizations willingness to help whilst addressing any concerns they have about the eldercare programs	10	31	3	30	2	18	5	45
Create a psychologically safe workplace by creating opportunities for employees to talk about the issue and by removing the stigma of taking time off to care for an elderly relative.	8	25	2	20	2	18	4	36
Ensure eldercare is included when discussing mental health issues or w-l balance to build awareness about relationship between eldercare and stress.	3	9	0	0	0	0	3	27

Appendix 4 – What can Government do to Overcome Barriers to Change: by Sector

	Total (n=32)		Private (n=10)		Public (n=11)		Not for Profit (n=11)	
	#	%	#	%	#	%	#	%
Educate the public and organizations	14	44	6	60	5	45	3	27
Change the narrative, promote the conversation. Make the case for eldercare to be an important driver of need for family leave (e.g. as has been done for domestic violence leave)	10	31	4	40	4	36	2	18
Demystify the process of looking for eldercare resources; Use social care coordinators who can navigate system.	4	13	2	20	1	9	1	9
Educate employers on building a culture where employees feel safe	1	3	1	10	0	0	0	0
Introduce specific legislation to support issues associated with eldercare	13	41	5	50	3	27	5	45
Financial support or tax relief for long term employed eldercare support including transport	2	6	1	10	1	9	1	9
Protected leave of absence	1	3	1	10	0	0	0	0
Paid short leave of absence for eldercare options exploration	1	3	0	0	0	0	1	9
End of life policy	2	6	0	0	1	9	1	9
Offer something similar to parental sharing benefit(childcare) or parental leave for eldercare	5	16	4	40	0	0	1	9
Extend and improve existing policies and programs	8	25	4	40	0	0	4	36
Increase length of family/compassionate leave/EI	3	9	2	20	0	0	1	9
Provide funding for real cost of benefits (not a percentage)	1	3	0	0	0	0	1	9
Restart senior benefit plans	1	3	0	0	0	0	1	9
Improve eldercare facilities make them less scary & more affordable	2	6	2	20	0	0	0	0
Make it a policy priority	2	6	0	0	1	9	1	9
Support more focused research by government	2	6	1	10	0	0	1	9
How can we make work-life balance accessible?	1	3	1	10	0	0	0	0
More data from Statistics Canada measuring the extent of this issue	1	3	0	0	0	0	1	9

Appendix 5 – What can Researchers do to Overcome Barriers to Change: by Sector

	Total (n=32)		Private (n=10)		Public (n=11)		Not-for Profit (n=11)	
	#	%	#	%	#	%	#	%
Make practical outcomes of research available e.g. publicly available resource kit of strategies & implementation; sharing ideas/research with other organizations; case studies & examples.	9	28	1	10	5	45	3	27
What impact does eldercare and stress have on employees e.g. employability or ability to do job?	6	19	2	20	3	27	1	9
What are other organizations doing – how do we compare – are we on the right track?	4	13	2	20	2	18	0	0
What works, what doesn't? What might have best impact?	4	13	2	20	0	0	2	18
Provide a better understanding of the link between home & work life for employees	3	10	2	20	1	9	0	0
What alternative approaches are other countries using e.g. link eldercare and student needs; look at northern Europe	2	6	0	0	0	0	2	18