



AGING IN THE WORKPLACE STUDY

OVERALL REPORT

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Mather LifeWays Institute on Aging
Evanston, Illinois

Table of Contents

	<u>Page</u>
Table of Contents	2
Executive Summary	4
Part I Job Satisfaction, Career Confidence, and Job Responsibility	
Introduction	8
Job Satisfaction	9
Career Confidence	13
Job Responsibility	16
Part II Intergenerational Workforce Dynamics	
Introduction	18
Measuring Intergenerational Workforce Dynamics	19
Intergenerational Workforce Dynamics and Job Satisfaction	20
Age and the Supervisor	21
Myths About the Older Worker	22
Intergenerational Opportunities: Mentorship	24
Employee Suggestions	26
Part III Retirement Planning	
Introduction	28
Knowledge of Sample Company Retirement Policy	29
Defining Retirement	30
Age and Retirement	31
Concerns about Retirement	33
Retirement Decision Making	35
Early Retirement	39
Post-Retirement Employment	40
The Desirability of Post-Retirement Employment	42
Post-Retirement Employment Decision-Making	44
Incentives to Stay in the Workforce Post-Retirement	45
Employee Comments	47
Part IV The Impact of Caregiving	
Introduction	49
Defining Key Concepts	50
Prevalence and Workplace Support	51
Snapshot of Employee Caregiving	53



Table of Contents (Cont.)



	<u>Page</u>
Part IV The Impact of Caregiving (Cont.)	
Caregiver Burden	55
The Costs of Caregiving	57
Workplace Disruptions	58
Caregiving by Age– Sample Company	60
Employee Caregiving Needs	62

Sample

256 Sample Company employees took part in this study. *Roughly, we were able to survey about 68% of full-time employees.*

The majority of the sample is overwhelmingly female. 79 percent of respondents were female. The typical Length of Service of our respondents varied widely by location. The Length of Service is evenly spread, with the bulk of respondents having worked at Sample Company from 1 to 10 years (1 to 3 years, 24 percent; 3 to 6 years, 21 percent; 6 to 10 years, 22 percent). 52 percent of respondents were 46 years old or older. 32 percent were between 31 and 45, and 16 percent 18 to 30 years of age.

Analysis

The data presented in this report have been subjected to a number of different analyses in order to help us identify key groups of questions, analyzable factors, and reliable scales. The two primary analyses were factor analysis and scale reliability analysis. By examining the relationships between individual items, factor analysis allowed us to confirm that sets of questions were actually measuring similar concepts. We were able to confirm or identify seven separate factors: job satisfaction, career confidence, job responsibility, intergenerational cooperation, intergenerational closeness, generational solidarity, and intergenerational work pressure. These factors provide the primary foundation for the bulk of our analysis in the first two sections of this report. Descriptions of these factors can be found on pages 8, 12, and 19.

To further confirm the usefulness of these factors, we subjected them to scale reliability analyses (with the exception of job responsibility, which is only one question). Scale reliability analysis allowed us to test the extent to which respondents answered questions in similar ways. Our scales were in fact useful and reliable measures of the factors mentioned above.

To facilitate easy interpretation, the bulk of this report is comprised of simple descriptive statistics and straightforward correlations.

Key Findings

Given its mission, it is not surprising that Sample Company has a workplace culture and policies that are highly functional for a multigenerational workforce. However, there are important caveats to pay attention to. For instance, younger workers are less satisfied in their jobs, are less confident in their career paths than older workers, and are likely to report wanting more job responsibility.

The first important finding of this study was the significant relationship between all of our intergenerational workforce dynamics measures and job satisfaction. The more cooperation and close contact between different generations there is, the more likely they were to report high levels of job satisfaction. Furthermore, higher levels of reported intergenerational conflict and age segregation (generational solidarity) were associated with lower levels of job satisfaction.

A majority of workers of all ages report that they plan to work in their post-retirement years. Their primary reasons for planning this type of employment are financial. Most employees plan on pursuing employment part-time or seasonally after age 65. These findings suggest that an important current and future source of recruitment for part-time job openings will be past and present retirees.

Finally, nearly a third of Sample Company employees are currently providing unpaid care to an adult loved one or friend. The majority of these employees report experiencing some level of burden related to their care and, as a consequence, they are experiencing caregiving-related workplace disruptions such as absenteeism. These findings suggest that the potential for lost productivity due to caregiving related workplace conflicts is considerable.

Job Satisfaction

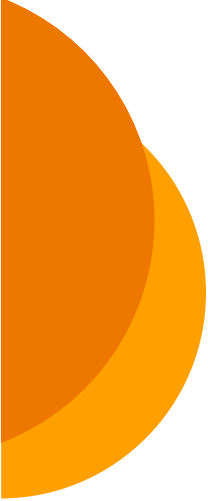
- Sample Company employees report high levels of job satisfaction (77%)
- Older workers (46 years old and older) report higher levels of job satisfaction than younger workers (18 to 30): 80% to 59%.
- Older workers (46 years old and older) report higher career confidence than younger workers (18 to 30): 83% to 72%.
- Younger workers (18 to 30 years old) at Sample Company are more likely to report that they want greater work responsibility than older workers (46 and older): 79% to 57% .

Intergenerational Workforce Dynamics

- Intergenerational cooperation and conflict are significantly associated with job satisfaction
- The majority of respondents take an “age neutral stance” on their supervisor, reporting that experience can be separated from age when it comes to younger supervisors
- A small proportion of employees harbor myths about generations other than their own
- Over two-thirds of Sample Company employees are open to being mentored and to mentoring others

Key Findings (continued)

Retirement Planning

- 
- Less than one-third of Sample Company employees report being knowledgeable of the retirement benefits available to them
 - Most employees have financial concerns when thinking about their own personal retirement; this is especially true for middle-aged employees
 - Sample Company employees report that most important reasons to retire were being financially secure, desiring more leisure, and desire to spend time with family; this is especially true for younger workers
 - Only about 20% of employees reported that they would be likely to accept an early retirement, slightly fewer said they did not know and that this decision would depend on the circumstances of their life at the time of the offer
 - Two-thirds of Sample Company employees plan to seek post retirement employment; this is especially true for those reporting high job satisfaction
 - The above findings are interesting, given that only a small minority of employees find post-retirement employment desirable
 - Compensation, finances, and the need to support an ailing loved one are the most important factors in the decision to seek post-retirement employment
 - Training, physical accommodations, medical benefits, compensation, and flex-time are the most important incentives for keeping older workers in the workforce, post-retirement

Caregiving

- Caregiving has impacted over one-third of Sample Company employees over the past 12 months
- 86% of employees believe that it is important for their employer to provide flexible work arrangements so that they can balance their work and home lives
- Nearly the same number of employees believe that Sample Company provides the support they need to find a balance between their home and work lives
- Roughly two-thirds of Sample Company caregivers have been providing care for two years or more
- Roughly one-third of caregivers are experiencing a high level of caregiver burden
- Over 50% of employees spend \$100 or more out-of-pocket every month in order to provide care to an adult family member or friend
- 45% of employees report that their work and caregiving roles come into conflict at least sometimes
- 51% of employees report at least one workplace disruption (i.e., coming in late, leaving early, reducing hours, etc.) has occurred in the past 12 months because of their caregiving activities



Part I

Job Satisfaction, Career Confidence, and Responsibility



Introduction

Job Satisfaction, Career Confidence, and Responsibility

Introduction

This survey focuses primarily on key issues of aging in the workforce. However, it was important to assess more general issues of job satisfaction, career confidence, and job responsibility. These measures allow us to take a snapshot of Sample Company employees' attitudes about their job and career. We can then examine these measures within the context of the key issues of an aging workplace in the sections that follow. Here, we are primarily interested in discovering any generational differences in job satisfaction, career confidence and the desire for more job responsibility.

A large body of research supports the idea that job satisfaction is a key determinant of length of tenure, turnover, and productivity. In addition, when an employee demonstrates high levels of confidence in their career path, they are likely to be more highly engaged in their work, to desire more job responsibility, and to be generally more satisfied with their work than other employees.

This section will provide you with two main pieces of information:

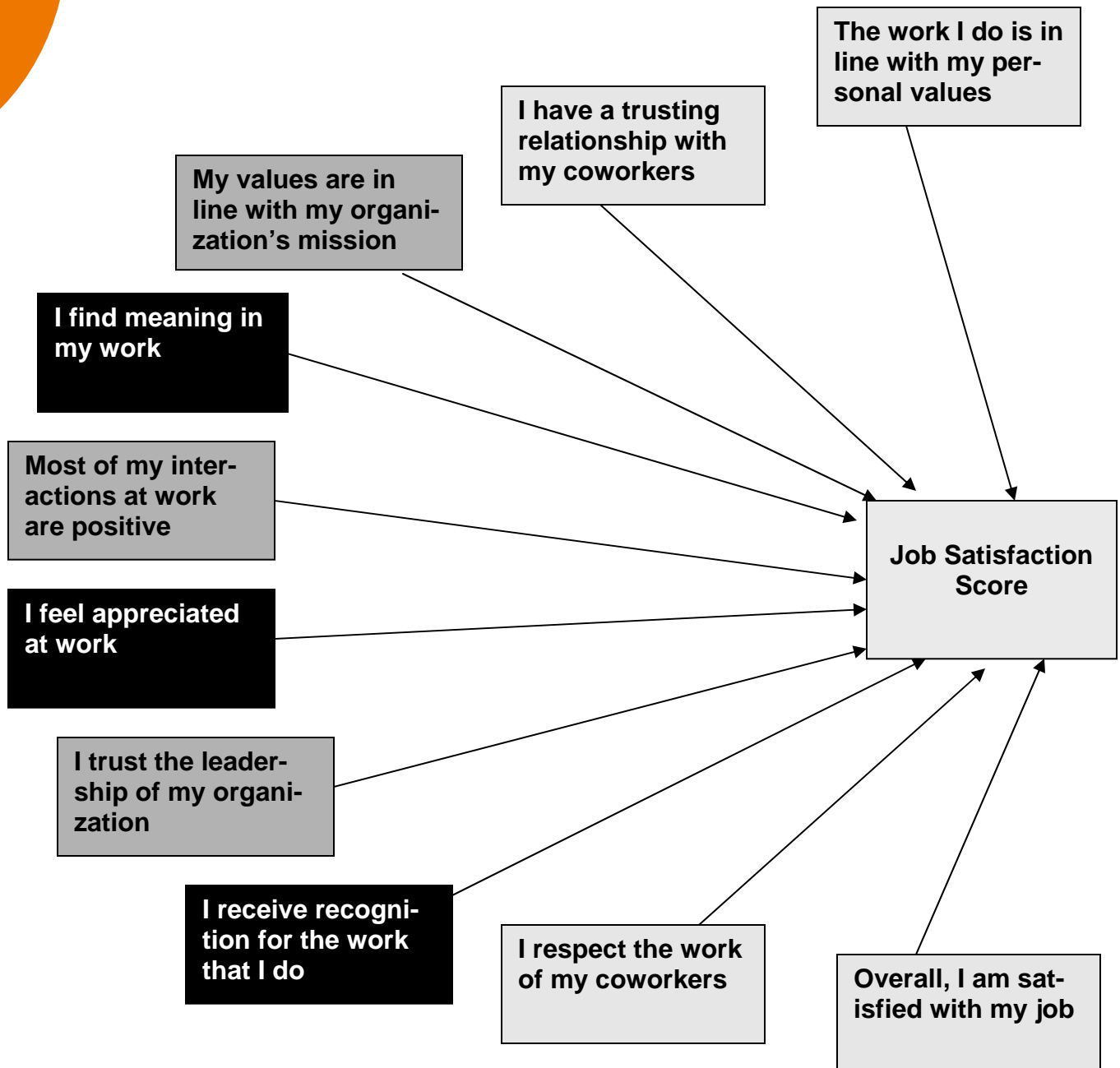
- 1) The general level of job satisfaction and career confidence of Sample Company employees, as well as how much more responsibility Sample Company employees desire.
- 2) A basic demographic profile of Sample Company employees that compares their job satisfaction, career confidence, and desire for more responsibility by age, gender, and length of service.

Defining Job Satisfaction



The Job Satisfaction Score

The average score given on a battery of questions measuring multiple dimensions of job satisfaction. Job satisfaction is the primary outcome measure utilized in this survey. **A score of 3 or higher indicates that respondents agree that their job satisfaction is high, on average.**



Job Satisfaction

Tables at a Glance


Generally, Sample Company employees demonstrate a high level of job satisfaction. The first table displays the overall job satisfaction score for Sample Company. The second shows the percent of respondents who agree or disagree with each item that is a part of the job satisfaction score.

Job Satisfaction Score	
Overall Average	3.21
% With High Satisfaction*	76.6
% With Low Satisfaction*	23.4
Number of Respondents (N)	184

The work I do is in line with my personal values	
% Agree	94
% Disagree	6
I have a trusting relationship with my coworkers	
% Agree	89.5
% Disagree	10.5
I find meaning in my work	
% Agree	93.9
% Disagree	6.1
Most of my interactions at work are positive	
% Agree	91.1
% Disagree	8.9
I feel appreciated at work	
% Agree	80.1
% Disagree	19.9

*Respondents whose average job satisfaction score was greater than or equal to three are considered to have high job satisfaction. Any score less than three is defined as low job satisfaction in this table.

Job Satisfaction (continued)



I trust the leadership of my organization	
% Agree	83.6
% Disagree	16.4
My values are in line with my organization's mission	
% Agree	92.7
% Disagree	7.3
I receive recognition for the work that I do	
% Agree	78
% Disagree	22
I respect the work of my coworkers	
% Agree	96.8
% Disagree	3.2
Overall, I am satisfied with my job	
% Agree	91.9
% Disagree	8.1

Job Satisfaction and Demographics

Tables at a Glance

Older workers are significantly more satisfied with their jobs than younger workers. Men and women, as well as long-time and newer employees, display similar levels of job satisfaction.

These tables compares the percentage of those with high and low job satisfaction by age, gender, of length of service.

Job Satisfaction by Age *	18 to 30	31 to 45	46 and Older
% High Satisfaction	58.6	78.6	80
% Low Satisfaction	41.4	21.4	20
N	29	56	95

Job Satisfaction by Gender	Female	Male
% High Satisfaction	75	78.4
% Low Satisfaction	25	21.6
N	140	37

Job Satisfaction by Length of Service	3 Years or Less	More than 3 Years
% High Satisfaction	72	79.8
% Low Satisfaction	28	20.2
N	75	109

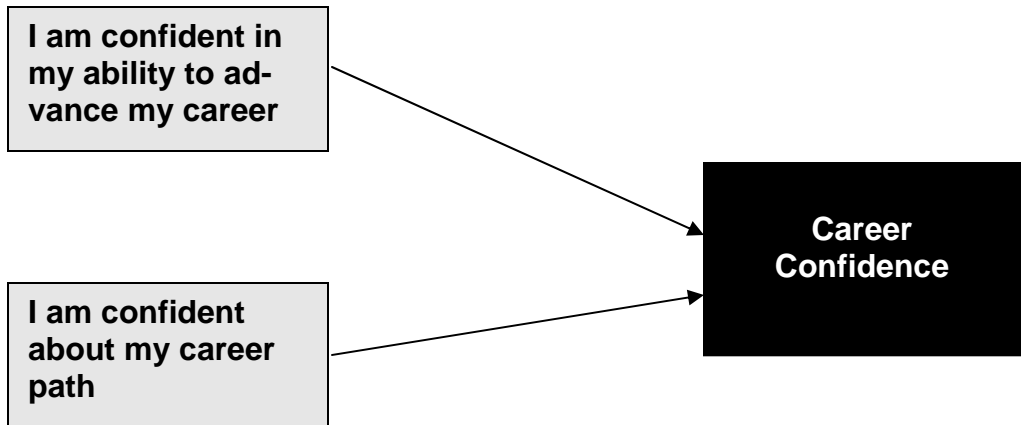
* Statistically significant at $p=.054$

Career Confidence



The Career Confidence Score

The average score given on two questions measuring confidence in career growth. **A score of 3 or higher indicates the respondent is confident in his or her career.**



Career Confidence

Tables at a Glance

Sample Company employees report having a high degree of confidence in their ability to advance their careers and feel confident in their general career path.

The first table provides the average career confidence score of Sample Company employees. The second table provides the percent of respondents who agree or disagree with the items that make up the career confidence score.

Career Confidence Score	
Overall Average	3.13
% With High Career Confidence*	82
% With Low Career Confidence*	18
N	183

I am confident in my ability to advance my career	
% Agree	84.7
% Disagree	15.3
I am confident about my career path	
% Agree	85.5
% Disagree	14.5

*Respondents whose average career confidence score was greater than or equal to three are considered to have high career confidence. Any score less than three is defined as low career confidence in this table.

Career Confidence and Demographics

Tables at a Glance

Older workers and long-term employees report higher levels of career confidence than younger workers and short-term employees.

These tables compare employee career confidence scores by age, gender, and length of service.

Career Confidence by Age	18 to 30	31 to 45	46 and Older
% High Confidence	72.4	84.2	83
% Low Confidence	27.6	15.8	17
N	29	57	94

Career Confidence by Gender	Female	Male
% High Confidence	83.3	76.3
% Low Confidence	16.7	23.7
N	138	38

Career Confidence by Length of Service*	3 Years or Less	More than 3 Years
% High Confidence	74.7	87
% Low Confidence	25.3	13
N	75	108

* Statistically significant at $p \leq .05$

Job Responsibility

Tables at a Glance

Roughly two-thirds of Sample Company employees would like more job responsibility. Younger workers are more likely to want more job responsibility than older workers.

The first table displays the percentage of employees agreeing or disagreeing that they would like more job responsibility. The remaining tables compare job responsibility by age, gender, and length of service.

I would like more Job Responsibility	
% Agree	63.6
% Disagree	36.4
N	187

Job Responsibility by Age: Sample Company *	18 to 30	31 to 45	46 and up
% Would Like More	79.3	67.2	56.8
% Would Not Like More	20.7	32.8	43.2
N	29	58	95

Job Responsibility by Gender: Sample Company	Female	Male
% Would Like More	62.4	71.1
% Would Not Like More	37.6	62.4
N	141	38

Job Responsibility by Length of Service: Sample Company*	3 Years or Less	More than 3 Years
% Would Like More	69.7	60.4
% Would Not Like More	30.3	39.6
N	76	111

*Statistically significant at the $p \leq .1$



Part II

Intergenerational Workforce Dynamics



Introduction

Intergenerational Workforce Dynamics

Introduction

Intergenerational workforce dynamics can be studied in a variety of ways and their importance for workplace culture and productivity is hard to overstate. In this survey, we chose to examine the extent of social distance and conflict between generations, workforce myths about older workers, the possibilities for intergenerational mentorship, and existing beliefs about aging and leadership. The most important finding was that a variety of measures of intergenerational social distance and conflict proved to be highly important determinants of job satisfaction. On the other hand, there appears to be a considerable amount workplace age segregation and myths harbored about older workers. Yet, a desire to increase the quality and quantity of intergenerational workplace interactions is evident in these results (i.e. high levels of desired mentor, mentoree relationships).

96 percent of Sample Company employees believe that “communication between coworkers of different age groups is important for a healthy workplace environment”. In addition, 92 percent of Sample Company employees agree that working with coworkers of different ages enhances the quality of my work life”.

With these findings in mind, please note that the results reported in this section are presented in a way that highlights how the quality of intergenerational workplace interactions helps determine of job satisfaction.

Three measures of Intergenerational Social Distance and one measure of Intergenerational Conflict were used in this survey.

Intergenerational Social Distance

Intergenerational Cooperation measures the extent that Sample Company employees feel they can communicate effectively with workers of different ages, feel that their workplace is healthy one for workers of all ages, and feel they work in an environment that respects workers of all ages.

Generational Solidarity measures the degree of interest that Sample Company employees have in fostering intergenerational friendships, the extent they believe their coworkers prefer to interact with coworkers their own age, and how much they agree that employees work best with coworkers who are their own age.

Intergenerational Closeness measures the frequency of intergenerational conversations about work, other than work, and personal life. It also measures the frequency of intergenerational interaction at work functions, eating meals at work with coworkers of different ages, and the frequency of interacting with coworkers of different ages outside of work.

Intergenerational Conflict

Intergenerational Work Pressure measures the degree of belief that older workers are pressured to retire by coworkers and the feelings of pressure to step aside by older and younger coworkers.

Interpreting these Measures

Intergenerational Cooperation-The work environment is thought to promote a quality work life for workers of all ages and ensures an open environment of intergenerational communication and teamwork.

Generational Solidarity-The degree to which workers segregate themselves into age cohorts in the workplace.

Intergenerational Closeness-The degree to which workers interact and converse in meaningful ways across the generations (i.e., about work, about things outside of work, and about their personal lives).

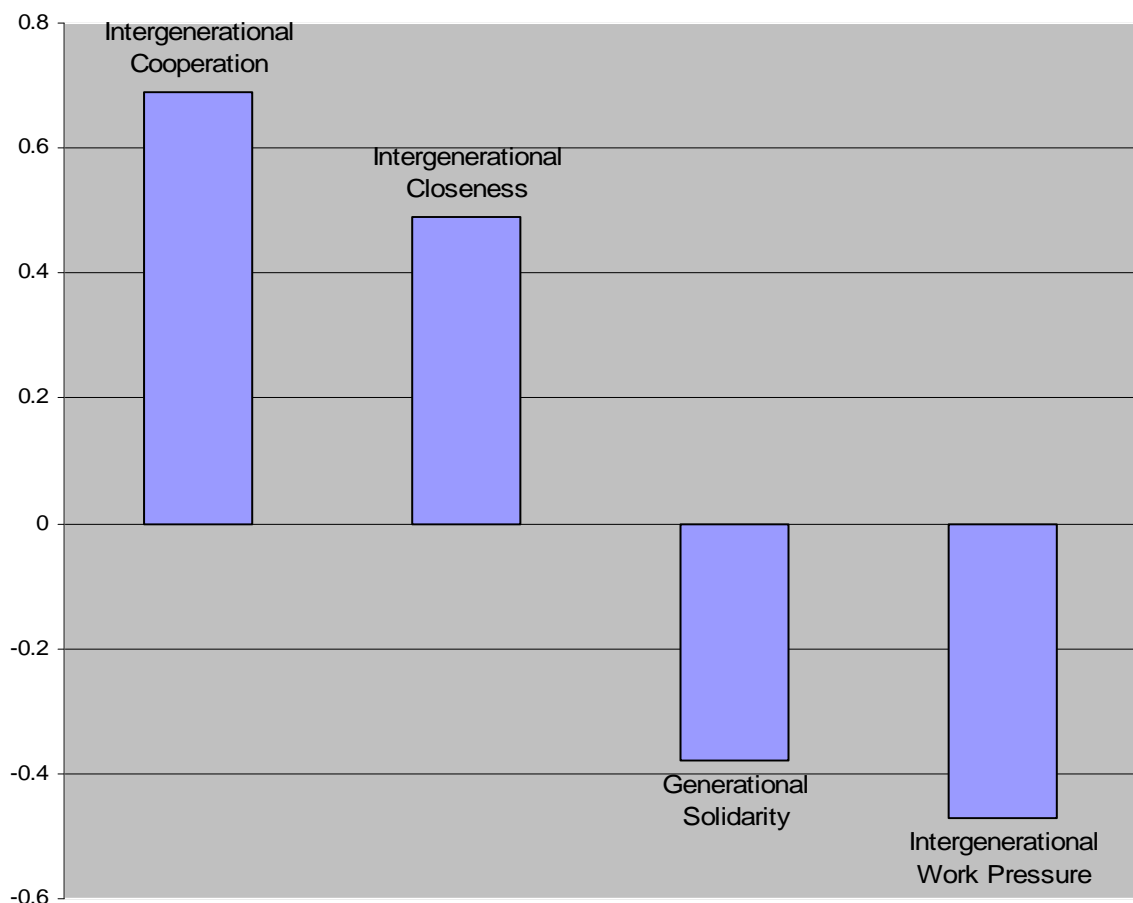
Intergenerational Work Pressure-The degree to which job related conflict exists between age groups.

Chart at a Glance

Our analysis suggest that efforts to foster intergenerational workforce interactions and teamwork may be a fruitful way of enhancing job satisfaction.

Relationships between all of our Intergenerational Workforce Dynamic measures and job satisfaction were found to be statistically significant. Greater Intergenerational Cooperation (very strong) and Intergenerational Closeness (moderate to strong) are associated with higher levels of job satisfaction. Greater Generational Solidarity (moderate) and Intergenerational Work Pressure (moderate to strong) are associated with lower job satisfaction.

Correlation with Job Satisfaction



Interpreting Correlations

Standards for assessing strength of association vary. However, it is typical that an association of .5 or higher is considered strong, .21-.49 is considered moderate, and anything below .2 is considered weak.

All correlations were found to be statistically significant

Table at a Glance

The majority of respondents (64%) disagree or have no opinion that the age of their supervisor plays a positive role in the quality of their work life.

Note: This question must be interpreted within the context of the comments provided on the page below.

The age of my supervisor makes a positive difference in the quality of my work life	
% Agree	35.4
% Disagree	41.4
% No Opinion	23.2

Respondents were asked to explain their answers. Their answers revealed two very distinct ways of conceptualizing leadership experience.

We found that people disagreed for two reasons: 1) Many people valued experience over age. These respondents were likely to stress the importance of knowledge, competence, personality, and performance and were likely to believe these traits to be independent of age. 2) A handful of people experienced intergenerational conflict with their supervisors and suggested that their supervisor's age had a negative impact on the quality of their worklife.

We found that people agreed for one reason: 1) Most of those who agreed tied experience to age. Nearly all of these respondents suggested that the knowledge, skills, and abilities to lead flow from the age of their supervisor and as a consequence of their life experiences. A few even suggested they would have difficulty taking orders from a supervisor who was much younger. A very small group of people felt the close proximity of their supervisors' age contributed to the quality of their worklife.

It is important to note that the chasm between these two major standpoints on age and leadership can be a source of potential workplace conflict, especially in light of the age graded findings on the desire for more job responsibility.

(See Appendix A for the Raw Respondent Comments)

Myths About Older Workers

Myths about older and younger workers impact the workplace in multiple ways. Most notably, job satisfaction will decline when talented employees are overlooked because of their youth or old age.

Older workers are difficult to train	18 to 30	31 to 45	46 and up
% Disagree	58.6	64.9	90.4
% Agree	41.4	35.1	9.6
Older workers have a lot to offer the workplace			
% Disagree	3.4	14	8.5
% Agree	96.6	86	91.5
Older workers are creative			
% Disagree	13.8	32.1	10.8
% Agree	86.2	67.9	89.2
Older workers are too cautious			
% Disagree	51.7	56.1	68.1
% Agree	48.3	43.9	31.9
Older workers can adapt to technological change			
% Disagree	34.5	35.1	9.8
% Agree	65.5	64.9	90.2
Older workers can perform physical work			
% Disagree	37.9	32.1	12.1
% Agree	62.1	67.9	87.9
Older workers are interested in technological change			
% Disagree	44.8	55.4	25.3
% Agree	55.2	44.6	74.7
Older workers are inflexible			
% Disagree	75.9	78.6	71
% Agree	24.1	21.4	29

Myths About Older Workers (continued)

Older workers dislike taking orders	18 to 30	31 to 45	46 and up
% Disagree	48.3	60.7	78.3
% Agree	51.7	39.3	21.7
Older workers are reliable			
% Disagree	0	19.3	4.3
% Agree	100	80.7	95.7
Older workers are loyal			
% Disagree	3.4	22.8	6.5
% Agree	96.6	77.2	93.5
Older workers want more responsibility			
% Disagree	31	52.7	36.2
% Agree	69	47.3	63.8
Older workers work longer hours than younger ones			
% Disagree	58.6	71.4	60.9
% Agree	41.4	28.6	39.1
Older workers make fewer mistakes than younger ones			
% Disagree	82.8	81.8	64.1
% Agree	17.2	18.2	35.9
Older workers are more productive than younger ones			
% Disagree	79.3	75	61.3
% Agree	20.7	25	38.7

Intergenerational Opportunities: Mentorship

Table at a Glance

The vast majority of respondents are open to being mentored or in mentoring someone else. Roughly 1/2 are already mentoring other employees.

Mentorships are an efficient way of passing on job skills and knowledge to inexperienced employees of all ages. They also allow experienced employees to take on much desired leadership responsibilities in their capacity as a mentor.

Do you mentor any of your coworkers	
% Yes	51.9
% No	48.1
If yes, is this person...	
% Younger	58.8
% Older	19.6
% Roughly the Same Age	21.6
Would you be interested in being mentored by another employee	
% Yes	59.8
% No	40.2
If yes, would you rather this person be...	
% Younger	7.8
% Older	31.3
% Roughly the Same Age	7
% No Preference	53.9
Would you be interested in mentoring another employee	
% Yes	68.5
% No	31.5
If yes, would you rather this person be...	
% Younger	24.6
% Older	4
% Roughly the Same Age	4
% No Preference	67.5

Intergenerational Opportunities: Mentorship by Age

Table at a Glance

A significant proportion of mentorship relationships have developed between different generations of workers. Older workers are more open to mentoring their co-workers and are more likely to report having no preference in the age of who they would be willing to be mentored by.

Do you mentor any of your coworkers*	18 to 30	31 to 45	46 and up
% Yes	10.3	55.2	61.3
% No	89.7	44.8	38.7
If yes, is this person...*			
% Younger	20	40.6	72.6
% Older	0	31.3	14.5
% Roughly the Same Age	80	28.1	12.9
Would you be interested in being mentored by another employee			
% Yes	62.1	63.8	58.9
% No	37.9	36.2	45.2
If yes, would you rather this person be...*			
% Younger	0	5.4	10.3
% Older	50	43.2	19
% Roughly the Same Age	12.5	5.4	6.9
% No Preference	37.5	45.9	63.8
Would you be interested in mentoring another employee*			
% Yes	48.3	72.4	71.4
% No	51.7	27.6	28.6
If yes, would you rather this person be...			
% Younger	14.3	31.0	23.9
% Older	7.1	2.4	3
% Roughly the Same Age	7.1	7.1	1.5
% No Preference	71.4	59.5	71.6

*Statistically significant at the $p \leq .1$

Summary

Employees were asked the question, “In what ways can your employer facilitate a better work life for employees of all ages?” *Their responses reveal their overwhelming concern for impartial workplace practices concerning age. Several respondents volunteered that Sample Company already does a wonderful job in this regard.*

(See Appendix B for the raw responses to this question)

Sample Company employees have a diverse array of worklife suggestions that can be categorized under three main themes: Aging Neutral Policies, Training Opportunities, and Flexible Work Arrangements.

Aging Neutral Policies

Sample Company employees suggest that care be taken to ensure that workplace policies, promotions, and training options take into account the skills and talents of employees over and against their age.

Training Opportunities

Many Sample Company employees expressed their support for ongoing training opportunities that have been offered and suggest continuing to work to enhance these offerings, especially trainings to keep up with work-related technological changes.

Flexible Work Arrangements

The comments suggest that flexible scheduling is highly valued by the employees of Sample Company.



Part III

Retirement Planning



Part III

Retirement Planning

Introduction

Research has shown that only a minority of U.S. companies have prepared for the eventual retirement of their aging workforces. This section is meant to provide you with basic information concerning the retirement plans and needs of your workforce.

This section can be used in two ways:

1) *To help gauge the retirement planning of Sample Company Employees.*

This section provides an overview of their general concerns about retirement, the factors that are important for their retirement decisions, and their perceived needs for retirement planning.

2) *To help assess the post-retirement job demands of Sample Company Employees.*

This section provides a snapshot of the possible post-retirement labor pool that exists within Sample Company. It provides us with the ability to estimate how many people are open to post-retirement employment and why.

Knowledge of Sample Company Retirement Policy

Table at a Glance

Sample Company employees report that they are not very knowledgeable of the organization's retirement policy. 65% of Sample Company employees suggested they did not know if Sample Company offered early retirement. Similarly, roughly one-third of Sample Company employees reported that they were not knowledgeable of the retirement benefits to them.

Does your employer offer early retirement	
% Yes	24.9
% No	10.2
% Don't Know	65
How knowledgeable are you of the retirement benefits available to you	
% Not Knowledgeable	35.4
% Somewhat Knowledgeable	39.2
% Knowledgeable	25.4

Summary

We asked all respondents to define retirement in their own terms. *A large majority of respondents emphasized retirement as a time of individual autonomy where they are free from financial and work obligations. They stressed the importance of spending time with friends and family, as well as being able to relax.* Furthermore, the answers provided by many respondents indicate that work is viewed as a compulsory activity and as a means to achieving the ideal typical forms of retirement that they described in their comments. (see appendix E for comments.)

Despite these very idealistic definitions of retirement, many employees express a desire and/or need to continue working post-retirement.

Typical responses include:

“End your career and live a stress free life”

“Enjoy life and reap the rewards of your work life”

“Find time to enjoy things I couldn’t do while working”

“Free to do a job or career you always wanted to do!”

“Relaxing and enjoying life”


“Stop a scheduled existence. Have more time to explore new options...”

Table at a Glance

Most employees expect to retire when they are older than 61. Generally, many of the same people are willing to work slightly longer than they consider to be typical as a part-time worker.

At approximately what age do you expect to retire	
% 54 Years Old or Younger	2.2
% 55 to 61	14.7
% 62 to 66	41.8
% 67 to 71	23.9
% 72 Years Old or Older	17.4
What is the oldest age at which you might continue working full time	
% 54 Years Old or Younger	5.5
% 55 to 61	14.8
% 62 to 66	38.5
% 67 to 71	23.1
% 72 Years Old or Older	18.1
What is the oldest age at which you might continue working part-time	
% 54 Years Old or Younger	2.7
% 55 to 61	7.7
% 62 to 66	21.9
% 67 to 71	31.7
% 72 Years Old or Older	36.1

Age and Retirement (continued)



What is the typical retirement age at your workplace	
% 54 Years Old or Younger	1.7
% 55 to 61	3.3
% 62 to 66	52.2
% 67 to 71	11.7
% 72 Years Old or Older	2.8
% There is No Typical Age	28.3
What is the typical retirement age in your profession	
% 54 Years Old or Younger	2.2
% 55 to 61	7.2
% 62 to 66	44.2
% 67 to 71	13.3
% 72 Years Old or Older	3.9
% There is no Typical Age	29.3

Concerns about Retirement

Table at a Glance

Respondents were asked how concerned they were about the following issues when thinking about their own retirement. *Financial concerns are overwhelmingly the most concerning issues for Sample Company employees.* Roughly two-thirds are concerned about illness and disability after retirement; one-half are concerned about being unproductive; roughly one-third will miss the work or their coworkers.

Miss the Work	
% Not Concerned	35.9
% Somewhat Concerned	28.7
% Concerned	35.4
Not Doing Anything Productive or Useful	
% Not Concerned	25.8
% Somewhat Concerned	23
% Concerned	51.1
Illness or Disability	
% Not Concerned	17.3
% Somewhat Concerned	17.3
% Concerned	65.4
Not Having Enough Income to Get By	
% Not Concerned	10.4
% Somewhat Concerned	23
% Concerned	77
Losing Touch with Coworkers	
% Not Concerned	37.4
% Somewhat Concerned	34.6
% Concerned	28

Concerns about Retirement By Age

Table at a Glance

Respondent concerns vary slightly by age group. *Interestingly, middle aged workers report more retirement concerns than both older and younger workers.* They are more likely to miss the work, miss their coworkers, are more concerned about illness or disability, and are significantly more likely to worry about having enough income to get by.

	18 to 30	31 to 45	46 and Up
Miss the Work			
% Not Concerned	39.3	31	40
% Somewhat Concerned	39.3	31	24.4
% Concerned	21.4	37.9	25.5
Not Doing Anything Productive of Useful			
% Not Concerned	14.3	25	31.2
% Somewhat Concerned	32.1	26.8	18.9
% Concerned	53.6	48.2	50
Illness or Disability			
% Not Concerned	25	10.5	20.2
% Somewhat Concerned	14.2	12.3	20.2
% Concerned	60.8	77.2	59.6
Not Having Enough Income to Get By*			
% Not Concerned	14.3	3.5	14
% Somewhat Concerned	10.7	3.5	19.4
% Concerned	75	93	66.6
Losing Touch with Coworkers			
% Not Concerned	42.9	24.1	44.6
% Somewhat Concerned	42.9	41.4	28.3
% Concerned	14.3	34.5	27.1

* Statistically significant at $p \leq .05$

Table at a Glance

Respondents were asked how important the following reasons to retire were to them. *These findings indicate that financial security and desire to spend time with family are the most important reasons to retire.* Leisure, hobby, and friendship are slightly less important.

Financial Security	
% Not Important	2.2
% Somewhat Important	3.3
% Important	94.5
Poor Health	
% Not Important	7.7
% Somewhat Important	13.3
% Important	78.9
Desire to Explore or Focus on Hobbies	
% Not Important	18.5
% Somewhat Important	33.1
% Important	48.3
Leisure Activities	
% Not Important	17
% Somewhat Important	29.1
% Important	53.9
Do Not Like the Work	
% Not Important	38.8
% Somewhat Important	23
% Important	28.2

Retirement Decision Making (continued)

To Spend More Time with Family	
% Not Important	5.6
% Somewhat Important	16.1
% Important	78.3
Caregiving Responsibilities	
% Not Important	17.2
% Somewhat Important	20
% Important	62.8
Desire to Be Own Boss	
% Not Important	38.1
% Somewhat Important	19.3
% Important	42.6
Chance to Travel	
% Not Important	12.6
% Somewhat Important	19.2
% Important	68.2
Desire More Time with Friends	
% Not Important	17.7
% Somewhat Important	32.8
% Important	49.4

Retirement Decision Making By Age

Table at a Glance

Younger employees at Sample Company are more likely than older workers to see leisure, job dissatisfaction, a desire to travel, spending more time with friends and family as important reasons to retire.

Financial Security	18 to 30	31 to 45	46 and Up
% Not Important	0	0	3.2
% Somewhat Important	3.6	3.4	3.2
% Important	96.4	96.6	93.6
Poor Health			
% Not Important	3.6	6.8	10.1
% Somewhat Important	10.7	12.1	13.5
% Important	83.6	81.1	76.4
Desire to Explore or Focus on Hobbies*			
% Not Important	10.7	8.9	27.5
% Somewhat Important	28.6	35.8	31.9
% Important	60.7	55.3	40.7
Leisure Activities			
% Not Important	7.1	13.7	22
% Somewhat Important	17.9	31	30.8
% Important	75	55.2	47.3
Do Not Like the Work*			
% Not Important	17.9	32.1	48.9
% Somewhat Important	17.9	32.1	18.8
% Important	64.3	35.7	32.3

Retirement Decision Making by Age (continued)

To Spend More Time with Family	18 to 30	31 to 45	46 and Up
% Not Important	0	1.8	10
% Somewhat Important	3.6	17.5	17.8
% Important	96.4	80.7	72.2
Caregiving Responsibilities			
% Not Important	17.8	15.8	18.9
% Somewhat Important	10.7	24.6	21.1
% Important	71.4	59.6	60
Desire to Be Own Boss			
% Not Important	17.9	26.3	51.1
% Somewhat Important	21.4	24.6	15.2
% Important	60.7	59.2	33.7
Chance to Travel*			
% Not Important	7.1	10.3	15.2
% Somewhat Important	7.1	20.7	21.7
% Important	75.7	68.9	63.1
Desire More Time with Friends			
% Not Important	7.1	17.6	20.9
% Somewhat Important	17.9	35.1	36.2
% Important	75	47.3	42.9

* Statistically significant at $p \leq .1$

Table at a Glance

Respondents were asked how likely they would be to accept an offer of early retirement. Employees appear to be lukewarm to the idea of early retirement. *This is especially true for the oldest category of workers (46 and up).*

Respondents were asked to explain their answers. Not surprisingly, their comments revealed that the decision to retire early would have to be based on whether or not they were financially capable of retiring and whether or not the retirement package offered to them made for a sustainable retirement (see appendix F for comments).

If your employer offered early retirement, how likely would you be to accept that offer	
% Not Likely	37.1
% Somewhat Likely	24.6
% Likely	21.3
% Don't Know	16.9
Likelihood by Age- 18 to 30	
% Not Likely	33.3
% Somewhat Likely	29.6
% Likely	18.5
% Don't Know	18.5
Likelihood by Age- 31 to 45	
% Not Likely	18.9
% Somewhat Likely	32.8
% Likely	26
% Don't Know	22.4
Likelihood by Age- 46 and up	
% Not Likely	48.4
% Somewhat Likely	19.4
% Likely	19.3
% Don't Know	12.9

Post-Retirement Employment

Table at a Glance

Roughly two-thirds of respondents plan to continue working after retirement. A small minority of employees believe they will be working for Sample Company up to their retirement. However, note that many would consider working for Sample Company during post-retirement (see pages 51-52).

Opportunities to offer part-time or seasonal employment to new retirees exist and will likely become more available as the workforce ages.

Do you plan to continue working after you formally retire	
% Yes	67.4
% No	32.6
Do you believe you will be working in your current profession when you retire	
% Yes	48.6
% No	51.4
Do you believe you will be working for your current employer when you retire	
% Yes	28.8
% No	71.2
Would you consider working for your current employer after you formally retire	
% Yes	52.2
% No	47.8
Would you keep working in some capacity even if you could afford to retire	
% Yes	69.1
% No	30.9

Post-Retirement Employment and Job Satisfaction

Table at a Glance

Job satisfaction is a significant factor in whether or not employees plan to continue working post-retirement. Employees with high job satisfaction more likely to report planning on staying in their profession and at their current employer until they retire.

Do you plan to continue working after you formally retire*	High Satisfaction	Low Satisfaction
% Yes	73.3	51.2
% No	26.7	48.8
Do you believe you will be working in your current profession when you retire*		
% Yes	55.6	25.6
% No	44.4	74.4
Do you believe you will be working for your current employer when you retire*		
% Yes	34.8	9.3
% No	65.2	90.7
Would you consider working for your current employer after you formally retire*		
% Yes	61.2	23.3
% No	38.8	76.7
Would you keep working in some capacity even if you could afford to retire*		
% Yes	73.7	52.5
% No	26.3	47.5

* Statistically significant at $p \leq .05$

The Desirability of Post-Retirement Employment

Table at a Glance

Even though a high percentage of employees plan to work post-retirement, this option is seen as desirable for only a minority of employees.

We asked what capacity each respondent foresaw themselves working in during post-retirement. The vast majority of respondents saw themselves working in a part-time capacity as either a consultant, volunteer, or even in their same job.

Retire and leave the workforce completely	
% Not Desirable	38.7
% Somewhat Desirable	24.9
% Desirable	36.4
Retire and reenter the workforce full-time at a different employer	
% Not Desirable	73
% Somewhat Desirable	19.9
% Desirable	7.2
Retire and reenter the workforce part-time at a different employer	
% Not Desirable	37
% Somewhat Desirable	33.1
% Desirable	29.8
Retire and reenter the workforce full-time at the same employer	
% Not Desirable	75.3
% Somewhat Desirable	12.9
% Desirable	11.8

The Desirability of Post-Retirement Employment (continued)

Retire and reenter the workforce part-time at the same employer	
% Not Desirable	41
% Somewhat Desirable	31.5
% Desirable	27.5
Retire and start own business	
% Not Desirable	38.3
% Somewhat Desirable	20
% Desirable	41.6
Retire and work part of the year or seasonally	
% Not Desirable	21.3
% Somewhat Desirable	27.5
% Desirable	51.1
How interested are you in pursuing a new job after you retire	
% Not Interested	29.1
% Somewhat Interested	17
% Interested	29.1
% Don't Know	24.7

Post-Retirement Employment Decision Making

Table at a Glance

Respondents were asked how important the following issues would be in a retiree's decision to reenter the workforce. *These findings indicate that compensation, finance, and the need to care for loved ones may be the most important reasons for post-retirement employment.* However, the sense of accomplishment and the need for social interaction were only slightly less important.

Miss the Work	
% Not Important	14.4
% Somewhat Important	30.9
% Important	54.7
Financial Reasons Draw Them Back to Work	
% Not Important	7.1
% Somewhat Important	15.8
% Important	77
The Sense of Accomplishment and Productivity	
% Not Important	7.5
% Somewhat Important	20.2
% Important	70.3
The Need to Support a Dependent Loved One	
% Not Important	10.1
% Somewhat Important	12.8
% Important	77.1
Benefits (e.g., Health Insurance)	
% Not Important	3.5
% Somewhat Important	12.8
% Important	82.6
Opportunities for More Social Interaction	
% Not Important	8.4
% Somewhat Important	25.7
% Important	65.9


Incentives to Stay in the Workforce Post-Retirement

Table at a Glance

Respondents were asked how important the following incentives would be in keeping older workers in the workforce post-retirement. *These findings indicate that providing the material support on the job (e.g., physical accommodations and training) and in life (e.g., medical benefits, compensation, flex-time, etc) are the most important incentives for post-retirement employment.*

Physical Accommodations	
% Not Important	8.4
% Somewhat Important	24.9
% Important	67.6
Retraining	
% Not Important	10
% Somewhat Important	21.1
% Important	68.9
More Responsibility	
% Not Important	27.1
% Somewhat Important	34.8
% Important	36.1
Less Responsibility	
% Not Important	20.7
% Somewhat Important	39.7
% Important	39.6
Medical Benefits	
% Not Important	.5
% Somewhat Important	7.7
% Important	91.7

Incentives to Stay in the Workforce Post-Retirement (continued)



Salary	
% Not Important	2.2
% Somewhat Important	10.5
% Important	87.3
A Raise	
% Not Important	5
% Somewhat Important	16.1
% Important	78.9
A Bonus	
% Not Important	4.9
% Somewhat Important	16.9
% Important	78.1
Flexible Schedule	
% Not Important	2.8
% Somewhat Important	12.6
% Important	84.4
3 to 6 Month Sabbaticals	
% Not Important	16.6
% Somewhat Important	20.1
% Important	63.2

Summary

Each respondent was asked what information their employer could provide that would help them plan their retirement. *A large number of Sample Company employees report that they would like more information regarding the retirement benefits and policies of Sample Company, and quite a few expressed interest in obtaining financial guidance to help in their planning.* The comments indicate that they would like detailed information concerning their benefits presented on an ongoing basis, as well as having ready access to individualized information that helps them monitor their planning goals. (See Appendix G for raw comments)

Typical responses include:

“Financial advisor access”

“Financial stats about predicted future costs of living and my predicted financial stats”

“General information about the plan itself, costs, benefits, etc.”

“How much money you will get when you retire”

“I believe they already provide it. I just haven’t looked closely”

“Individual consultation and a seminar and refresher on steps and planning”

“What are some of the plans that they offer?”



Part IV

The Impact of Caregiving



Part IV

The Impact of Caregiving

Introduction

The research literature overwhelmingly suggests that *workplace disruptions are more likely to occur while an employee provides ongoing care for their family and/or friends*. These disruptions are problematic for both the employee and the employer. The employee is likely to lose wages, benefits, and promotions when these disruptions become so severe that the employee is forced to miss time and relinquish responsibilities at work. This type of conflict has a negative impact on their physical and mental health. At best, a workplace with a high degree of caregiving faces increased demand for flexible scheduling because of the caregiving needs of their workforce. At worst, they will experience high levels of absenteeism, lost productivity, and risk losing talented and committed employees.

The good news is that employers that support the caregiving activities of their employees can help retain talented employees and even boost their productivity. They can do so by helping employees balance the conflicts that they will inevitably face between their roles as a caregiver and employee.

This final section is meant to provide information on the prevalence of caregiving in your workplace, its impact on your employees, and the types of information they need to support their caregiving activities.

Caregiving

Caregiving was defined in the following way for the purposes of this survey:

“...any type of social, emotional, and physical support that you may have provided to an adult loved one. These activities include medical care (e.g., administering medicine, treatments, etc.), social or emotional support (e.g., dropping in for moral support, providing friendly advice, etc.), financial support, and physical support (e.g., helping with mobility or performing household chores and yard work). Even if you only rarely provide these forms of support to an adult family member or friend, please consider yourself a caregiver for the purposes of this survey.”

Work Place Disruption

We asked if each employee had experienced or considered all of these workplace disruptions because of caregiving in the past 12 months. We combined each of these into a single score, indicating the number of disruptions that occurred in the past 12 months.

- Arrive late to work
- Leave early from work
- Take a leave of absence
- Take a less demanding job
- Turn down a promotion
- Lose any of your job benefits
- Consider early retirement
- Consider reducing your work hours
- Change work schedule/work flex hours

Caregiver Burden

This concept refers to the stress and lifestyle disruptions that result because of their caregiving activities. We combined the following questions into a single score to assess the degree of burden they were experiencing as a caregiver.

- Have you had to give up pursuing hobbies as a consequence of your caregiving?
- Do you get less exercise than you would like because of your caregiving activities?
- Have you had to give up socializing with friends or family because of caregiving?
- How much physical strain do you experience because of caregiving activities?
- How emotionally stressful would you say that caring for your love one is for you?
- How much financial hardship do you experience because of your caregiving?
- Do you have less time with friends or family because of caregiving?
- Have you had to give up or pass on vacations as a consequence of caregiving?

Table at a Glance

39% of Sample Company employees have provided care for an adult loved one or friend in the past 12 months. *The vast majority of employees believe that Sample Company provides a good home and work balance and that this balance is important; however, they feel that additional support would be personally beneficial.*

In the past 12 months have you provided unpaid care for a relative or friend who is 18 years old or older	
% Yes	39.3
% No	60.7
How important is it that your employer offer flexible work arrangements that help you to balance your responsibilities at home and work	
% Not Important	3.1
% Somewhat Important	10.6
% Important	86.3
My employer provides the support I need to balance my work and caregiving responsibilities	
% Agree	81.2
% Disagree	18.8
If your employer provided additional support to employees for their caregiving activities how personally beneficial would this be	
% Not Beneficial	9.8
% Somewhat Beneficial	18.4
% Beneficial	71.8

The Prevalence of Caregiving and Need for Workplace Support By Age

Table at a Glance

At least 1/3 of Sample Company employees have provided care to a loved one in the past 12 months. Slightly more older workers have provided care than younger workers. Workers of all ages report that a supportive and flexible workplace is important. A majority of employees report that additional workplace support would benefit them personally.

In the past 12 months have you provided unpaid care for a relative or friend who is 18 years old or older	18 to 30	31 to 45	46 and Up
% Yes	33.3	40.4	41.5
% No	66.7	59.6	58.5
How important is it that your employer offer flexible work arrangements that help you to balance your responsibilities at home and work			
% Not Important	0	0	6.4
% Somewhat Important	3.7	11.8	11.5
% Important	96.3	88.2	82
My employer provides the support I need to balance my work and caregiving responsibilities			
% Agree	80.8	81.4	82.9
% Disagree	19.2	18.6	17.1
If your employer provided additional support to employers for their caregiving activities how personally beneficial would this be*			
% Not Beneficial	23.1	3.7	8.8
% Somewhat Beneficial	23.1	20.4	16.5
% Beneficial	53.8	75.9	74.7

* Statistically significant at $p \leq .05$

Snapshot of Employee Caregiving

Table at a Glance

Sample Company employees are involved in the entire spectrum of caregiving. A small percentage are involved in intensive caregiving relationships; while the vast majority involve themselves more casually. The majority have been involved in caregiving for more than 2 years.

How many adults do you currently provide care for	
% 0	59.3
% 1	26.7
% 2 or More	14
Where does this person live	
% In My Home	30.6
% Within 20 to 30 Minutes from Home or Work	26.4
% Within 30 minutes to 2 Hours from Home or Work	20.8
% More than 2 Hours from Home or Work	22.2
How often do you provide care for a family member/friend who is 18 years old or older	
% Everyday	9.6
% A Few Times Per Week	5.1
% A Few Times Per Month	11.5
% A Few Times Per Year	23.6
% Never	50.3

Snapshot of Employee Caregiving (continued)

Approximately how long have you provided care for your loved one(s)/friends	
% Less than 6 Months	12
% 6 Months to a Year	6.7
% 1 to 2 Years	20
% More than 2 Years	61.3
Has anyone else provided unpaid care to your loved one or friend during the past 12 months	
% Yes	60.5
% No	39.5
Does your loved one or friend receive care from a pay-for-service caregiver (e.g., home health nurse)	
% Yes	31.1
% No	68.9
Would you consider yourself the primary caregiver for your loved one or friend	
% I am the Primary Caregiver	32.4
% Someone Else is the Primary Caregiver	35.1
% I share the Caregiver Duties with Others Equally	32.4

Note: Only a small percent of respondents were willing to volunteer personal information about their care recipient (e.g., age, relationship, and reasons for caregiving). From the limited number of responses it appears, expectedly, that the large majority of caregiving employees are taking care of aging parents, in-laws, and other immediate family members. The most common reasons for caregiving include both an array of chronic and acute illnesses.

Caregiver Burden

Table at a Glance


This table reports the Caregiver Burden Score and the responses of each individual item making up the Caregiver Burden Score. The Caregiver Burden Score broken down to reflect high, medium, and low levels of burden. To be have “high burden” was to answer “Yes” or report some kind of hardship on roughly 2/3 of the questions. For those with “medium burden” this is true for roughly 1/3 of the questions. “Low Burden” means to have answered “Yes” or report some kind of hardship on less than 1/3 of the questions.

Caregivers at Sample Company report a considerable amount of burden across the board. Over one-half report medium to high levels of Caregiver Burden.

Caregiver Burden	
% High	36.8
% Medium	24
% Low	38.9
Have you had to give up pursuing hobbies	
% Yes	34.5
% No	65.5
Do you get less exercise that you would	
% Yes	46.3
% No	53.7
Have you had to give up socializing with friends/family	
% Yes	35.3
% No	64.7

Note: Sample Company employees experiencing a moderate level of caregiver burden are more likely to report low job satisfaction than employees experiencing high and low levels of burden.

Caregiver Burden (continued)



How much physical strain do you experience	
% A Lot	7.2
% Some	21.7
% A little	24.1
% None at All	47
How emotionally stressful would you say caring for your loved one is for you	
% A Lot	19
% Some	28.6
% A Little	36.9
% None at All	15.5
How much financial hardship do you experience	
% A Lot	20
% Some	17.5
% A Little	25
% None at All	37.5
Do you have less time with friends or family	
% Yes	41
% No	59
Have you had to give up or pass on a vacations	
% Yes	40.8
% No	59.2

Table at a Glance

There are two primary measures that assess the costs of caregiving. The first represents the direct out-of-pocket financial cost of caregiving. The second assesses the conflict between the employee's roles as a caregiver and employee. *These caregiving costs can become a source of caregiver burden and workplace disruption should they become too unwieldy for the employee.*

There is considerable variation in the expenses that employees pay out of pocket. Over one-third report spending over \$200 a month on caregiving out-of-pocket. 45% of Sample Company care providers report that their caregiving and employee roles conflict sometimes or often.

How much of your own money do you spend providing care for your loved one(s)/friend(s) during the average month	
% Less than \$20	17.6
% \$21 to \$100	27
% \$101 to \$200	16.2
% \$201 to \$500	17.6
% \$500 or More	21.6
How often do your roles as an employee and a caregiver come into conflict	
% Never	29.1
% Rarely	25.3
% Some	32.9
% Often or Very Often	12.7

Workplace Disruptions

Table at a Glance

This table reports the amount of workplace disruptions employees have to deal with because of caregiving responsibilities.

About half of Sample Company respondents report considerable numbers of workplace disruptions. The most common disruptions have to do with arriving early, leaving late, or changing one's work hours to accommodate caregiving needs.

Workplace Disruptions	
% Zero	48.8
% 1 to 2	28.9
% 3 to 5	18.6
% 6 to 9	3.6
Arrive late to work in order to provide care	
% Yes	35.8
% No	64.2
Leave early from work in order to provide care	
% Yes	41.8
% No	58.2
Take a leave of absence in order to provide care	
% Yes	11.7
% No	88.3
Take a less demanding job	
% Yes	11.7
% No	88.3

Workplace Disruptions (Continued)

Turn down a promotion in order to provide care	
% Yes	4.9
% No	95.1
Lose any of your job benefits because you were providing care	
% Yes	3.6
% No	96.4
Consider early retirement	
% Yes	7.9
% No	92.1
Consider reducing your work hours	
% Yes	12.7
% No	87.3
Change work schedule/work flex hours	
% Yes	20.0
% No	80

Note: Sample Company employees who experience greater worklife disruptions because of caregiving are more likely to report lower job satisfaction.

Caregiving by Age


Table at a Glance

Caregiving clearly impacts employees of all ages. However, it appears that older workers are involved in slightly more intensive caregiving relationships. They report experiencing a higher level of caregiving burden than younger employees.

Each generation of worker experiences workplace disruptions as a consequence of their caregiving.

In the past 12 months have you provided unpaid care for a relative or friend who is 18 years old or older	18 to 30	31 to 40	46 and up
% Yes	33.3	40.4	41.5
% No	66.7	59.6	58.5
Currently, how often do you provide care for a family member/friend who is 18 years old or older			
% Everyday to a Few Times Per Week	7.4	13.7	18.2
% A Few Times Per Month to a Few Times Per year	29.6	41.2	32.5
% Never	63	45.1	46.4
How many adults do you provide care for?			
% None	66.7	55.1	58.3
% 1	22.2	32.7	25
% 2 or More	11.1	12.2	16.7
How often do your roles as an employee and a caregiver come into conflict			
% Never	20	32	29.5
% Rarely or Sometimes	70	52	59.1
% Often or Very Often	10	16	12.4

Caregiving by Age (continued)



Caregiver Burden	18 to 30	31 to 45	46 and up
% High	10.3	13.8	22.1
% Medium	20.7	12.1	8.4
% Low	69	74.1	69.5
Number of Workplace Disruptions			
% Zero	41.4	32.8	50.5
% 1 to 2	24.1	31	23.2
% 3 to 5	20.7	27.6	8.4
% 6 to 9	13.8	8.6	17.9

Summary

We assessed the caregiving needs of employees in two ways. First, we asked them to rate how much information they would like their employer to provide them on a range of key caregiving issues. Second, we asked them what they would like their employer to provide for them that would help them support their caregiving activities.

Sample Company employees are most concerned with practical issues that impact them personally and professionally. The following is a list of caregiving issues that employees would like at least “a little” of information on. This list is ranked from highest to lowest. You can find the % of employees who indicated their interest in at least “a little” information in parentheses:

- Balancing my work and family responsibilities (80.5%)
- Managing my emotional and physical stress (79.6%)
- Finding time for myself (76.8%)
- Managing challenging behavior (72.5%)
- How to talk to doctors and other health care professionals (71.1%)
- Tax Preparation (70.5%)
- Keeping the person I care for safe at home (70.5%)
- Making end-of-life decisions (68.9%)
- Activities I can do with the person I care for (67.7%)
- Moving or lifting the person I care for (64.3%)
- Choosing a home care agency (61.7%, 53.8%)
- Establishing guardianship or conservatorship (62.3%)
- Estate Planning (62.2%)
- Choosing a retirement community (58.4%)
- Finding adult day services (57.3%)

Employee Comments

When asked what caregiver information or resources they would like their employer to provide them, employees responded in one of three ways (See Appendix H for specific comments).

- 1) *They told personal caregiving stories that defined their specific needs.*
- 2) *They provided positive testimony to Sample Company’s existing support to caregivers*
- 3) *They reinforced their need for specific information about the issues listed above*